STATE OF SOUTH CAROLINA) **RESTRICTED ACCOUNT AGREEMENT**
)
COUNTY OF GREENVILLE) **CASE NUMBER:**

IN THE MATTER OF:

WHEREAS,_____ (hereinafter referred to as "CONSERVATOR"), has Petitioned to be appointed as Conservator for _____ and will be appointed by Court Order by the Greenville County Probate Court; and

WHEREAS, in order to avoid the necessity of posting a bond, CONSERVATOR has agreed to deposit the assets of the Conservatorship with a domestic bank/broker/dealer _____ (hereinafter referred to as "BANK/BROKER/DEALER") in a manner that prevents their unauthorized disposition, pursuant to §62-5-411 of the South Carolina Code;

NOW, THEREFORE, THE PARTIES HERETO (BEING THE CONSERVATOR, THE BANK/BROKER/DEALER AND THE COURT) AGREE AS FOLLOWS:

1. BANK/BROKER/DEALER agrees to establish a restricted account titled "_____ as Conservator for _____ . "

2. BANK/BROKER/DEALER and CONSERVATOR, expressly agree that any withdrawal from the accounts shall be allowed only upon certified Order of the Greenville County Probate Court authorizing a specific withdrawal for a specific amount at a specific time.

3. BANK/BROKER/DEALER and CONSERVATOR understand that the original of this document will be filed with the Greenville County Probate Court in order to induce the Court to appoint CONSERVATOR to that position without the necessity of the posting of bond.

4. Notwithstanding the restrictions provided in this Agreement, CONSERVATOR is permitted to (a) transfer funds among investments within the brokerage account so long as the investment remains subject to this Agreement, is held in the name set forth in paragraph 1 above, and is subject to the withdrawal restrictions set forth above; (b) invest the funds pursuant to the South Carolina Uniform Prudent Investor Act, §62-7-933 of the South Carolina Code. The CONSERVATOR may not sell or otherwise dispose of assets in this brokerage account for the purpose of removing assets from the account without Court approval, but shall have the authority to direct the BANK/BROKER/DEALER to reallocate funds among appropriate investments in a manner consistent with the account's stated investment objectives and risk tolerance.

5. The opening balance in the restricted account is $_____ as of _____, _____; or if not yet deposited, it is expected to be in the amount of $_____.

6. The account shall maintain a minimum of $_____ in liquid assets in order to pay taxes or to provide for emergency expenses without penalty.

7. The taxpayer identification number shall be the social security number of the incapacitated person or the minor.

8. Bank/Broker/Dealer shall provide a duplicate, summary statement either monthly or quarterly to the Greenville County Probate Court, 301 University Ridge, Suite 5600, Greenville, SC 29601, Attn: G/C Division.

9. SHOULD DISBURSEMENTS BE MADE WITHOUT A COURT ORDER, BANK/BROKER/DEALER MAY POTENTIALLY BE LIABLE FOR THE REIMBURSEMENT OF SUCH UNAUTHORIZED DISBURSEMENTS TO THE CONSERVATORSHIP ACCOUNT. NO ATM OR DEBIT CARDS WILL BE ISSUED ON THIS ACCOUNT.

Executed this ___ day of _____, ____

_____
CONSERVATOR SIGNATURE

_____
NAME (PRINTED)

ADDRESS:_____

_____

TELEPHONE #:_____

Executed this ___ day of _____, _____

_____
NAME OF BANK/FINANCIAL INSTITUTION

_____
BANK/BROKER/DEALER AUTHORIZED SIGNATURE

_____
NAME (PRINTED)

TITLE:_____

ADDRESS:_____

_____

TELEPHONE #:_____

THIS AGREEMENT MUST BE SIGNED BY AN AGENT OF THE BANK/BROKER/DEALER WITH ACTUAL AUTHORITY TO COMMIT THE BANK/BROKER/DEALER TO ACCEPT LIABILITY SHOULD DISBURSEMENTS BE MADE WITHOUT A COURT ORDER SUCH THAT BANK/BROKER/DEALER MAY POTENTIALLY BE LIABLE FOR THE REIMBURSEMENT OF SUCH UNAUTHORIZED DISBURSEMENTS TO THE CONSERVATORSHIP ACCOUNT.