

STATE OF SOUTH CAROLINA
COUNTY OF GREENVILLE

IN THE PROBATE COURT
CASE NUMBER: _____

IN THE MATTER OF:
_____,
a protected person.

CONSERVATOR REPORT

- ANNUAL REPORT
- AMENDED ANNUAL REPORT _____
- INTERIM REPORT REQUIRED BY COURT ORDER
- FINAL REPORT WITH APPLICATION/PETITION FOR DISCHARGE

NOTE: In addition to completing this form, if you seek Court action, you **must** file a pleading requesting relief.

1. The undersigned Conservator submits this Conservator Report covering the period from _____ (mm/dd/yy) through _____ (mm/dd/yy).
2. Does the Protected Person still require a conservatorship?
 YES NO Explain your answer.

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3. Should the duties, powers, or responsibilities of the Conservator over the Protected Person's assets be limited or expanded in any way?
 YES NO Explain your answer.

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4. Should changes be made to the current conservatorship financial plan (if one is in place)?
 YES NO NO FINANCIAL PLAN IN PLACE
(If YES, then please file an amended financial plan with your recommended changes).

5. ACCOUNTING SUMMARY

CALCULATION SUMMARY	
5a. BEGINNING BALANCE – From Inventory & Appraisalment (Form #550PC) OR Amount from Line 5(e) in the most recent Conservator Report).	\$
5b. PLUS: Total Receipts	\$
5d. LESS: Total Disbursements	\$
5e. ENDING BALANCE (subtract Line 5d from 5c)	\$

6. What are the current assets of the Protected Person managed by the Conservator:

DESCRIPTION OF ASSET	LOCATION OF ASSET OR NAME OF FINANCIAL INSTITUTION	CURRENT FAIR MARKET VALUE	COVERED BY INSURANCE?
REAL PROPERTY (Provide information on all real property held in the Protected Person's name except those held with rights of survivorship, to include, but not limited to Protected Person's home, rental properties, vacant land.)			
INVESTMENTS (Provide information on all conservatorship restricted accounts, stocks, bonds, notes, receivables, checking and savings accounts, certificates of deposit, mutual funds, retirement accounts, etc)			
MOTOR VEHICLES (Provide information on all motor vehicles titled in the Protected Person's name, either individually or jointly, or in the Conservator's name for the Protected Person.)			
OTHER ASSETS (Provide information on all other assets owned by the Protected Person including, but not limited to: business interests, home furnishings, collections, boats, recreational vehicles, jewelry, firearms, etc.)			

NOTE: IF THE SPACE PROVIDED IS NOT SUFFICIENT TO ANSWER THE QUESTIONS ABOVE, PLEASE COMPLETE YOUR ACCOUNTING ON A SEPARATE SHEET OF PAPER AND ATTACH.

- 7. Does the Protected Person have sufficient mental capacity to understand this Report?
 YES NO If yes, you must provide a copy of this Report to the Protected Person.
- 8. Does the Protected Person reside with his/her parents?
 YES NO If yes, you must provide a copy of this Report to his/her parent(s).
- 9. Does the Protected Person have a Guardian(s) appointed by this Court?
 YES NO If yes, you must provide a copy of this Report to his/her Guardian.
- 10. Has the Protected Person's contact information changed since the last Report?
 YES NO If yes, please provide updated contact information for him/her below.

Print Name: _____

 Telephone: _____
 Email: _____

PROOF OF DELIVERY

On the ____ day of _____, 20____, I mailed or delivered this Conservator Report to all persons required to receive a copy of this Report pursuant to SC Code Ann. §62-5-416 (C) and any Orders of this Court. Delivery was accomplished by the following method (check appropriate box(es)):

- personal delivery
- certified mail
- commercial delivery
- ordinary first-class mail
- registered mail

NAME

ADDRESS

VERIFICATION

The Conservator being sworn, states that the facts set forth in the foregoing Conservator Report are true and correct to the best of the Conservator's knowledge.

SWORN to before me this ____ day of _____, 20 ____.

Conservator's Signature: _____
Print Name: _____
Address: _____

Print Name: _____
Notary Public for: _____

Preferred Telephone: _____
Secondary Telephone: _____
Email: _____

My Commission Expires: _____

PLEASE CHECK THIS BOX IF THE CONTACT INFORMATION FOR THE CONSERVATOR HAS CHANGED SINCE THE LAST REPORT.