

CAUSE NO. GU \_\_\_\_\_

IN THE MATTER OF THE  
GUADIANSHIP OF

IN THE COUNTY COURT

\_\_\_\_\_

AT LAW OF

AN INCAPACITATED PERSON

WISE COUNTY TEXAS

**ANNUAL ACCOUNT OF GUARDIAN OF THE ESTATE**

To said Honorable Court:

NOW COMES \_\_\_\_\_, the Guardian of the estate of \_\_\_\_\_, files, in the above entitled and numbered proceeding, this exhibit upon the expiration of twelve months from the date of qualification and receipt of letters as such representative or from the last annual account, returning same in writing under oath. This account covers the time period from \_\_\_\_\_ to \_\_\_\_\_.

**1. Cash Balances**

Below is a list of the cash balances on hand and the name and location of the depositories where the case balances are kept:

Depository	Location	Type of Account	Balance
a. _____	_____	_____	\$ _____
b. _____	_____	_____	\$ _____

**2. Personal Property**

Below is a detailed description of the personal property of the estate.

**a. Bonds, Notes, and Other Securities**

Obligator	Obligee Or Bearer	Date of Issue	Date of Maturity	Rate of Interest	Serial or Other Identifying Numbers	Collateral	Other Identifying Information	How and Where Held for Safekeeping
1. _____	_____	_____	_____	_____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____	_____	_____	_____	_____

**b. Real Property**

1. _____	\$ _____
2. _____	\$ _____

**3. Claims Against the Estate**

The following is a list of all claims against the estate that were presented to the guardian within the period covered by the account which specifies the claims that have been allowed, paid, and rejected by the guardian, including the date of any rejection.

Claim (include date)	Allowed	Paid	Rejected
a. _____	_____	_____	_____
b. _____	_____	_____	_____
c. _____	_____	_____	_____
d. _____	_____	_____	_____
e. _____	_____	_____	_____

**4. Claims Litigated**

The following is a list of the claims that have been the subject of a lawsuit and the status of the suit.

Claim Sued Upon	Current Status of Suit
a. _____	_____
b. _____	_____

**5. New Property of Ward**

The following property has come to the guardian’s knowledge or into the guardian’s possession and has not been previously listed or inventoried as property of the ward.

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

**6. Changes to Ward’s Property**

The following are changes in the property of the ward which have not been previously reported:

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

**7. Receipts and Disbursements**

A complete account of receipts and disbursements for the period covered by this account, and the source and nature thereof, with receipts of principal and income shown separately, is as follows:

**Receipts:**

Receipts of principal: \_\_\_\_\_  
\_\_\_\_\_

Receipts of income: \_\_\_\_\_  
\_\_\_\_\_

**Disbursements:**

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

**8. Property Being Administered**

Below is a complete, accurate, and detailed description of the property being administered, the condition of the property, and the use being made of the property and, if rented, the terms upon and the price for which the property is being rented, is as follows:

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

STATE OF TEXAS

COUNTY OF \_\_\_\_\_

BEFORE ME, the undersigned authority, on this day personally appeared \_\_\_\_\_, who, being duly sworn, stated upon her oath that she is the Guardian of the Estate of \_\_\_\_\_, an Incapacitated Person, and that the above foregoing Annual Accounting, represents a true and correct accounting of the Estate of the said Ward; that all statements contained herein are true and correct; that the Guardian has filed all tax returns of the Estate due during the accounting period; and the Guardian has paid all taxes the Estate owed during the accounting period.

\_\_\_\_\_  
Guardian of the Estate of \_\_\_\_\_  
An Incapacitated Person

SUBSCRIBED AND SWORN TO BEFORE ME, by \_\_\_\_\_ on this the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public in and for the State of Texas

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**ORDER APPROVING ANNUAL ACCOUNT**

On this day the foregoing Annual Accounting was considered by the Court and the Court finds that it has jurisdiction and venue of this proceeding; that such Annual Accounting has remained on file for a full ten days before being considered; that the Court has advised itself as to the item contained in such Accounting, possession of cash and other assets kept in safekeeping, as well as those on deposit, that vouchers were produced and/or filed for each item of credit claimed in such Accounting and that satisfactory information and/or evidence was presented as to the status and existence of the assets of this Estate; and that the facts stated in such Accounting appear to be complete based upon the information presented and that this Accounting should be approved and ordered filed of record. That the court has advised itself as to the ward's condition and status and finds this guardianship should be continued without modification.

It is ORDERED that the foregoing Annual Accounting is approved, that the next accounting shall be due on \_\_\_\_\_, and that the guardian's letters shall expire on \_\_\_\_\_ unless a new accounting has been approved or this court extends the guardian's letters of guardianship by order of this Court.

SIGNED this \_\_\_\_\_ day \_\_\_\_\_, 20\_\_\_\_\_.

\_\_\_\_\_  
Melton D. Cude  
Judge, County Court at Law

## Supporting Vouchers

The following documents must be annexed to all annual accounts of guardians of estates according to V.A.T.S. Probate Code, § 741 (c):

“(1) proper vouchers for each item of credit claimed in the account, or, in the absence of a voucher, the item must be supported by evidence satisfactory to the court, and original vouchers may, on application be returned to the guardian after approval of the guardian’s account.

“(2) an official letter from the bank or other depository in which the money on hand of the estate or ward is deposited that shows the amounts in general or special deposits, and

“(3) proof of the existence and possession of securities owned by the estate or shown by the accounting, and other assets held by a depository subject to court order, the proof by one of the following means:

“(A) an official letter from the bank or other depository that holds the securities or other assets for safekeeping; provided, that if the depository is the representative, the official letter shall be signed by a representative of the depository other than the depository that verifies the account;

“(B) a certificate of an authorized representative of the corporation that is the surety on the representative’s bonds;

“(C) a certificate of the clerk or a deputy clerk of a court of record in the state; or

“(D) an affidavit of any other reputable person designated by the court on request of the guardian or other interested party.”

The requirements of the certificate or affidavit are set forth in V.A.T.S. Probate Code, § 711 (d). See § 56.6, *infra*.

The guardian must also file an affidavit under V.A.T.S. Probate Code, § 711 (e). See § 56.5, *infra*.

If the guardian, on the ward’s behalf, has not filed a tax return or paid taxes that are due on the filing of the account, the guardian must attach a description of the taxes and the reasons the guardian has failed to file the return or pay the taxes. V.A.T.S. Probate Code, § 714 (f).