

<input type="checkbox"/> District Court <input type="checkbox"/> Denver Probate Court _____ County, Colorado Court Address:  <hr/> <b>IN THE MATTER OF THE ESTATE OF:</b>  <b>Protected Person</b>	<b>▲ COURT USE ONLY ▲</b>
Attorney or Party Without Attorney (Name and Address):  Phone Number: _____ E-mail: _____ FAX Number: _____ Atty. Reg.#: _____	Case Number:  Division                      Courtroom
<b>FINANCIAL PLAN</b>	

**CONSERVATOR'S INFORMATION:**

Conservator's Name \_\_\_\_\_

Home Address: \_\_\_\_\_

Including P.O. Box \_\_\_\_\_

& Phone Number (\_\_\_\_\_) \_\_\_\_\_

  

Work Address: \_\_\_\_\_

Including P.O. Box \_\_\_\_\_

& Phone Number (\_\_\_\_\_) \_\_\_\_\_

**PROTECTED PERSON'S INFORMATION:**

Protected Person's Name \_\_\_\_\_

Current Address: \_\_\_\_\_

Include Name of Living \_\_\_\_\_

Center or Nursing Home \_\_\_\_\_

& Phone Number (\_\_\_\_\_) \_\_\_\_\_

This format is intended as a guide to conservators and their lawyers in preparing the financial plan required pursuant to §15-14-418, C.R.S. This outline is intended to be submitted with the inventory (CPC Form 20 & §15-14-419) within ninety (90) days after the appointment of a conservator. A Notice of Filing, along with copies of the financial plan and the inventory, must given to the protected person and any others as directed by the Court, within ten (10) days of filing. (§15-14-404(4)). The financial plan should be amended whenever there is a substantial deviation from the existing financial plan. (§15-14-418(5)). The conservator's accounting and report (§15-14-420) should be filed annually unless otherwise ordered.

**I. Current Assets**

<b>Description of the Asset</b>	<b>Market Value of the Asset</b>
Investments: _____	\$ _____
Real Estate: _____	\$ _____
Savings: _____	\$ _____
Checking: _____	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____
Total Market Value \$ _____	

**II. Liabilities**

<b>Description of the Liability</b>	<b>Current Amount of Liability</b>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total Liabilities \$ _____	

**III. Income** (List all sources of Income.)

<b>Description of Income</b>	<b>Amount of Income</b>
Social Security: _____	\$ _____
Retirement: _____	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____
Other: _____	\$ _____
Total Income \$ _____	

**IV. Expenses** (List all regular expenses.)

<b>Description of the Monthly Expense</b>	<b>Amount of Monthly Expense</b>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total Monthly Expenses \$ _____	

**V. Liquidity**

In view of the needs of the protected person at this time, what assets will need to be sold, what assets (personal property) held in storage, and what assets retained?

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**VI. Claims**

Are there claims on behalf of the protected person to be pursued? If so, please explain.

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Will litigation be necessary? If so, please explain.

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**VII. Debts**

Are there bills, claims, or debts unpaid at this time? If so, how do you intend to discharge those obligations?

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**VIII. Encouraging Self-Reliance and Independence**

What aspects of the protected person's financial affairs can that person continue to manage?

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What steps will be taken to develop or restore the protected person's ability to manage property?

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What is the expected duration of this conservatorship and why?

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**IX. Problems / Concerns**

State your own concerns or issues in the matter of handling this conservatorship, including any areas in which you may need specific assistance or guidance from professional advisors or this Court.

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**X. Any Other Aspects**

Are there any other aspects of the financial plan not covered by this outline? If so, please explain.

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Dated: \_\_\_\_\_

\_\_\_\_\_  
Signature of Conservator