

AOC-856 Doc. Code: SET  
 Rev. 2-99  
 Page 1 of 2  
 Commonwealth of Kentucky  
 Court of Justice  
 KRS 387.175 , 395.610 - 395.657  
 387.710, 387.670



**PERIODIC/FINAL SETTLEMENT OF  
 GUARDIAN/CONSERVATOR FOR**  
 MINOR  DISABLED PERSON

Case No. \_\_\_\_\_  
 Court \_\_\_\_\_  
 County \_\_\_\_\_

NOTICE TO GUARDIAN/ CONSERVATOR: File this settlement one year after appointment and annually thereafter, if the net estate is \$5000 or less, file this settlement every two years after the original report.

In re estate of \_\_\_\_\_,  a minor under the age of 18  disabled person.

Comes \_\_\_\_\_, who was appointed as  guardian/  
 conservator of the above estate on \_\_\_\_\_, \_\_\_\_\_, and  
 submits to the Court pursuant to  KRS 387.175 and 395.610-395.657 or  KRS 387.710 the following  periodic/  
 final settlement indicating by itemized statement and supported by receipts and vouchers the assets received and  
 disbursements made since the inventory or last settlement was filed:

**ASSETS AND INVESTMENTS**

(Anything of value to the Estate including Government benefits, social security and SSI Pension Plan Benefits, savings and checking accounts, certificates of deposit - all personal property, rents received from real estate; sales of real estate and personal property.)

-----	\$ -----
-----	\$ -----
-----	\$ -----
-----	\$ -----
<b>TOTAL ASSETS RECEIVED</b>	\$ -----

**DISBURSEMENTS**

-----	\$ -----
-----	\$ -----
-----	\$ -----
-----	\$ -----
<b>TOTAL DISBURSEMENTS MADE</b>	\$ -----

**BALANCE** (Assets less Disbursements) \$ -----

(For Periodic Settlements - carry balance forward to next report.)

For Final Settlements - indicate to whom balance paid and attach receipt.)

In Periodic Settlements:

PLAN FOR PRESERVING AND MAINTAINING THE ESTATE (not to be filled out if estate has net value of \$5,000 or less).

---

---

---

In Final Settlements:

UNPAID CREDITORS - ALLOWED CLAIMS

----- \$ -----

----- \$ -----

CREDITORS - DISALLOWED CLAIMS

----- \$ -----

----- \$ -----

Above named guardian/conservator submits this settlement for the Court, and if a final settlement, asks that the surety be discharged.

-----  
Guardian/Conservator

Subscribed and sworn to before me this date, \_\_\_\_\_, \_\_\_\_\_.

-----  
Name/Title