

**IN THE GUARDIANSHIP OF**

---

## **ACCOUNT FOR FINAL SETTLEMENT**

TO THE HONORABLE JUDGE OF SAID COURT:

NOW COMES \_\_\_\_\_, Guardian of the Estate herein, and respectfully presents this verified exhibit pursuant to the provisions of Texas Estates Code Sections 1204.101 and 1204.102.

1. **SERVICE OF GUARDIAN:** Guardian was appointed by Order signed \_\_\_\_\_ and qualified \_\_\_\_\_. Guardian has administered this estate in accordance with the provisions of the Texas Estates Code since that time.
2. **REASON FOR CLOSING:** This guardianship should be settled and closed pursuant to Texas Estates Code Section 1204.001 because: (Please select one)
  - The Ward reached the age of majority on \_\_\_\_\_ (MM/DD/YYYY)
  - The death of the Ward on \_\_\_\_\_ (MM/DD/YYYY)
  - Other: \_\_\_\_\_
3. **CITATION:** Pursuant to Texas Estates Code Section 1204.105:  
No personal service of citation necessary.
4. **PERIOD OF ACCOUNT:** This accounting covers the period from \_\_\_\_\_  
*(Enter the date of Guardian's appointment or the last Annual Account)* to \_\_\_\_\_  
*(Enter the date of Ward's death or other circumstance)*
5. **OPENING FIGURES:** The property of the Estate, as shown on the Inventory, Appraisement & List of Claims **[OR]** the last Annual Accounting approved on \_\_\_\_\_, was as follows:

## REAL PROPERTY

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

TOTAL REAL PROPERTY \$ \_\_\_\_\_

PERSONAL PROPERTY \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

TOTAL PERSONAL PROPERTY \$ \_\_\_\_\_

CASH ON HAND Listed by account number and bank location. \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

TOTAL CASH ON HAND \$ \_\_\_\_\_

OPENING FIGURES - TOTAL PROPERTY AND CASH ON HAND \$ \_\_\_\_\_

6. PROPERTY NOT PREVIOUSLY REPORTED: The following property has come into the hands of your Guardian which has not been previously reported to the Court:

None,

[OR] \_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
TOTAL PROPERTY NOT PREVIOUSLY REPORTED \$ \_\_\_\_\_

7. CHANGES: The following changes have occurred in the condition of the Estate which have not been previously listed or inventoried:

None

[OR] A. By Order signed \_\_\_\_\_ \$ \_\_\_\_\_  
B. By Order signed \_\_\_\_\_ \$ \_\_\_\_\_  
C. \_\_\_\_\_ \$ \_\_\_\_\_  
TOTAL CHANGES IN PROPERTY \$ \_\_\_\_\_

8. RECEIPT: The receipts of the Estate are as shown in the attached Exhibit "A", and are summarized as follows:

Interest on Estate Accounts \$ \_\_\_\_\_

Refunds \$ \_\_\_\_\_

Rental Income \$ \_\_\_\_\_

Dividends \$ \_\_\_\_\_

Proceeds from Sale of Estate Assets \$ \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

TOTAL RECEIPTS \$ \_\_\_\_\_

9. DISBURSEMENTS: The disbursements of the Estate are as shown in the attached "B", and are summarized as follows:

Support and Maintenance \$ \_\_\_\_\_

Attorney's Fees \$ \_\_\_\_\_

Bond Premium \$ \_\_\_\_\_

Bank Charges \$ \_\_\_\_\_

Taxes \$ \_\_\_\_\_

Expenditures authorized by Court Order \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

TOTAL DISBURSEMENTS \$ \_\_\_\_\_

10. PROPERTY AND CASH ON HAND: The property currently being administered and cash remaining in the hands of your Guardian are as follows:

REAL PROPERTY \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

TOTAL REAL PROPERTY \$ \_\_\_\_\_

PERSONAL PROPERTY \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

TOTAL PERSONAL PROPERTY \$ \_\_\_\_\_

CASH ON HAND \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

_____	\$ _____
_____	\$ _____
_____	\$ _____
TOTAL CASH ON HAND	\$ _____
TOTAL PROPERTY AND CASH ON HAND	\$ _____

11. **SAFEKEEPIN:** The following assets belonging to the Estate are being held subject to safekeeping agreements:

None

**[OR]**

_____	\$ _____
_____	\$ _____
_____	\$ _____
TOTAL ASSETS IN SAFEKEEPING	\$ _____

12. **UNPAID DEBTS:** The following debts and expenses of the Estate have not been paid and are presently due and owed by the Estate:

None

**[OR]**

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
TOTAL UNPAID DEBTS	\$ _____

13. **CLAIMS:** The claims which have been presented against the estate are as follows:

None

**[OR]**

Claimant's name & address	Nature of claim	Amount allowed and approved	Amount rejected	Amount paid	Amount allowed but not paid
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
TOTAL CLAIMS					\$ _____

14. **TAX RETURNS:** A complete accounting of the taxes the Guardian has paid during the guardianship, including:

A) the tax returns the Guardian has filed during the guardianship;  
 B) the amount of taxes the Ward paid;  
 C) the date of payment;  
 D) the name of the governmental entity to which the Guardian paid the taxes;  
 and  
 E) a description of all current delinquencies in the filing of tax returns and the payment of taxes and the reason for each such delinquency.

15. OTHER FACTS NECESSARY FOR A FULL UNDERSTANDING OF THE CONDITION OF THE ESTATE, INCLUDING, BUT NOT LIMITED TO THE PAYMENT OF INSURANCE AND TAXES, IF ANY, ON ASSETS OF THE ESTATE:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

16. REQUESTED DISPOSITION OF REMAINING PROPERTY OF ESTATE:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

17. RECONCILIATION: The following is a summary and reconciliation of the foregoing paragraphs of this account:

	CASH	TOTAL ESTATE
17.5 OPENING FIGURES	\$ _____	\$ _____
17.6 PROPERTY NOT PREVIOUSLY REPORTED	\$ _____	\$ _____
17.7 CHANGES IN PROPERTY	\$ _____	\$ _____
17.8 RECEIPTS	\$ _____	\$ _____
17.9 DISBURSEMENTS	\$ (_____)	\$ (_____)
TOTAL 17.5 THROUGH 17.9	\$ _____	\$ _____
17.10 PROPERTY AND CASH ON HAND	\$ _____	\$ _____
17.11 ASSETS IN SAFEKEEPING	\$ _____	\$ _____
TOTAL 17.10 THROUGH 17.11	\$ _____	\$ _____
17.12 UNPAID DEBTS	\$ _____	
17.13 CLAIMS	\$ _____	
TOTAL NET VALUE OF ESTATE	\$ _____	

WHEREFORE, PREMISES CONSIDERED: your Guardian prays that the Court review and approve said Account.

Respectfully submitted,

\_\_\_\_\_, guardian

**AFFIDAVIT OF GUARDIAN**

THE STATE OF TEXAS    §  
                                  §  
COUNTY OF BELL §

Guardian, \_\_\_\_\_, being first duly sworn, upon his/her oath, deposes and says that:

*I am the Guardian in the above entitled and numbered cause. I have read and examined the foregoing Account for Final Settlement which is to be filed in this cause and:*

- A. *The account contains a true, correct and complete statement of the matters to which the account relates;*
- B. *the guardian has paid the bond premium for the next accounting period;*
- C. *the guardian has filed all tax returns of the ward due during the accounting period; and*
- D. *no taxes were owed by the ward during the accounting period.*

***[OR]***

*the guardian has paid all taxes the ward owed during the accounting period;*

- 1. *the amount of the taxes was \$ \_\_\_\_\_;*
- 2. *the date the guardian paid the taxes was \_\_\_\_\_;*
- 3. *the governmental entity to which the taxes were paid was \_\_\_\_\_.*

***[OR]***

*the guardian has NOT paid all taxes the Ward owed during the accounting period for this(these) reason(s): \_\_\_\_\_.*

***[OR]***

*the guardian has NOT filed all tax returns of the Ward due during the accounting period for the reason that \_\_\_\_\_.*

---

GUARDIAN OF THE ESTATE

SWORN TO AND SUBSCRIBED this \_\_\_\_\_ day of \_\_\_\_\_ 20 \_\_\_\_.

---

NOTARY PUBLIC, STATE OF TEXAS