

IN THE CIRCUIT COURT OF THE STATE OF OREGON
FOR THE COUNTY OF CLACKAMAS
Probate Department

In the Matter of the Conservatorship)	
)	Case No. _____
)	
Of:)	
)	ANNUAL REPORT OF
)	RESTRICTED FUNDS
_____)	
(Enter Name of Protected Person or Minor))	
)	
Birth Date of Protected Person _____)	

Pursuant to ORS 125.475, the undersigned reports to the Court as follows:

1. My name is _____

2. My residence address and telephone number are: _____

Phone: _____

3. The name (if applicable), and address of the place where the protected person now resides is: _____

4. A brief description of major decisions made on the protected person's behalf during the past year: _____

5. FUNDS HELD IN RESTRICTED ACCOUNTS TOTAL VALUE \$ _____

NAME OF INSTITUTION WHERE RESTRICTED FUNDS ARE HELD _____

**ENCLOSED ARE COPIES OF THE BANK STATEMENTS WITHIN 30 DAYS OF THE
ENDING DATE OF THIS ACCOUNTING AND CONFIRMING THE BALANCE ON
HAND**

6. I HEREBY CERTIFY THAT SINCE MY LAST REPORT: (All questions MUST be completed)

A. I have been convicted of the following crimes (not including traffic infractions):
(If none, so state)

A. I have filed for or received protection from creditors under the Federal Bankruptcy code:

No _____ If Yes, Bankruptcy Case No. _____

B. I have had a professional or occupational license revoked or suspended:

No ___ Yes ___ Explain: _____

C. I have had my driver=s license revoked or suspended: No _____ Yes _____

7. REQUEST FOR RELEASE OF RESTRICTED ASSETS (If applicable)

_____ The conservator herewith petitions the court for the release of the amount
of \$_____ from restricted conservatorship assets for the following purpose:

8. **I HEREBY CERTIFY THAT A TRUE COPY OF THIS REPORT HAS BEEN GIVEN OR MAILED TO THE PROTECTED PERSON OR MINOR (IF 14 YEARS OF AGE OR OLDER) AND ANY OTHER PERSON WHO IS ENTITLED TO OR HAS REQUESTED NOTICE AS FOLLOWS:**

<u>PERSON</u>	<u>By Personal Service or by Mail at:</u>	<u>Date served/mailed</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

I hereby declare that the above statement is true to the best of my knowledge and belief, and that I understand it is made for use as evidence in court and is subject to penalty for perjury.

DATED: _____

SIGNATURE OF CONSERVATOR

FOR COURT USE ONLY:

APPROVED: _____