

BASIC TRAINING FOR CONSERVATORS

TRAINING PACKET

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CONSERVATOR BASIC TRAINING CLASS

RESOURCE PAGE

Oakland County Probate Court
1200 N. Telegraph Road, Dept. 457
Pontiac MI 48341-0457

Telephone: 248-858-0260

Fax: 248-452-2016

Court Administrator
Edward A. Hutton III 248-858-5603

Probate Register
Barbara P. Andruccioli 248-858-0282

Helpful Websites:

OAKLAND COUNTY PROBATE COURT

General information, forms, procedures, FAQs, contacts

www.oakgov.com/courts/probate

Click on Guardianships/Conservatorships from the home page.

SCAO-APPROVED FORMS

The complete source for all state court-approved forms.

<https://courts.michigan.gov/Administration/SCAO/Forms/Pages/Conservator.aspx>

You may access other forms from the dropdown menu on left under “search for a court form.”

MICHIGAN COMPILED LAWS (MCLs)

The complete source for all Michigan laws.

<http://www.legislature.mi.gov>

*The Oakland County Probate Court thanks you for joining us today to learn more about your fiduciary duties.
Feel free to call us if you have further questions.*

Here are the court forms you *generally* may need to use:

List of Forms used:

SCAO Form #:

Account of Fiduciary	PC 583
Inventory	PC 674
Notice of Hearing	PC 562
Petition and Order	PC 586
Petition Regarding Real Estate/Dwelling	PC 646
Petition to Allow Account	PC 585a
Proof of Service	PC 564

Additional forms for minors:

Petition and Order to Use Funds	PC 673
Proof of Restricted Account and Annual Verification of Funds on Deposit (used for Minors only)	PC 669

Sample Case

Former television star, June Cleaver, is currently 89 years old. Her husband, Ward, died several years ago. June's oldest son, Wally Cleaver, is married and works as an insurance agent at the Eddie Haskell Insurance Agency in Novi. Her other son, Theodore "Beaver" Cleaver, is a cardiac surgeon at Beaumont Hospital (Royal Oak) and lives in Troy.

June is physically frail due to age, but is otherwise in good physical health. She is in the beginning stages of Alzheimer's disease, and is very forgetful and unable to manage her finances. She failed to heed Beaver's advice to have a Durable Financial Power of Attorney prepared, so Beaver, with Wally's consent, has been appointed as his mother's conservator by the Oakland County Probate Court on April 4, 2013. Wally serves as June's guardian.

Although June still owns the family house in Waterford, Beaver has convinced her to move into assisted living at American House. In addition to her other assets, June receives a monthly Social Security payment of \$886.00, and Ward's monthly pension of \$836.49 from his employer.

STATE OF MICHIGAN PROBATE COURT OAKLAND COUNTY CIRCUIT COURT -- FAMILY DIVISION	LETTERS OF CONSERVATORSHIP	FILE NO. 2013-293,801-CA
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Estate of JUNE CLEAVER Protected Individual

To: Name and address
Theodore Cleaver
19449 Maryland Lane
Troy, MI 48084

Conservator's telephone no.
248-555-1953

You have been appointed limited conservator(s) conservator(s) of the estate and are granted power to take possession, collect, preserve, manage, and dispose of property of the estate according to law and to perform all acts permitted or required by statute, court rule, and orders of this court unless limited below.

TIME LIMIT: These letters of authority expire and all powers shall terminate at midnight May 30, 2014
Date

- The conservator shall have authority with respect to all assets of the estate.
- Real estate or ownership interest in a business entity is excluded from your responsibilities in your acceptance of appointment.
- The conservator shall have authority with respect to the following assets only:

Restrictions:

The conservator shall not sell or otherwise dispose of the protected individual's principal dwelling, real property, or interest in real property or mortgage, pledge or cause a lien to be placed on any such property without a prior court order of approval.

Embossed seal will

be placed here

April 4, 2013
Date

Daniel A. O'Brien
Judge Bar no. CP

Attorney name (type or print) Bar no.

Address

City, state, zip Telephone no.

SEE NOTICE OF DUTIES ON SECOND PAGE

I certify that I have compared this copy with the original on file and that it is a correct copy of the original, and on this date, these letters are in full force and effect.

Date

Deputy probate register

Do not write below this line - For court use only

FILED April 4 20 13
Julie A. Riddle
Deputy Register of Probate

AS REQUIRED BY LAW AND MICHIGAN COURT RULES, YOU ARE NOTIFIED:

You are required to file with this court the following written documents using the indicated form(s) at the indicated times. Forms are available at the court or online at www.oakgov.com/probate.

INVENTORY: As the conservator, you are required by law to prepare an inventory of the assets of the estate that you have been given authority over within 56 days from the date of your appointment. You must also provide a copy of the inventory to the protected individual if the individual can be located and if the minor is 14 years of age or older and to interested persons as specified in the Michigan Court Rules. You must also provide the name and address of each financial institution listed on your inventory at the time the inventory is presented to the court. The address for a financial institution shall either that of the institution's main headquarters or the branch used most frequently by the conservator.

Your inventory is due on May 30, 2013 . (May use form PC 674, "Inventory, Conservatorship.")
Date

ACCOUNTS: As the conservator, you must file an annual account unless otherwise ordered by the court. An accounting must be filed within 56 days after the end of the accounting period. The accounting period ends on the anniversary date of the issuance of the letters of authority, unless the conservator selects another accounting period or unless the court orders otherwise. If you select another accounting period, notice of that selection shall be filed with the court. The accounting period may be a calendar year or a fiscal year ending on the last day of a month. You may use the same accounting period as that used for income tax reporting, and the first accounting period may be less than a year but not longer than a year. On filing, the account may be set for hearing or the hearing may be deferred to a later time.

Your annual account is due on May 30 of each year. (Use form PC 583 for annual; PC 648 for a Minor's Final Account)
Date

Your annual account should cover events from: April 4 to: April 4

In addition, you must provide a copy of the account to the protected individual if the individual can be located and is 14 years of age or older, and to interested persons as specified in the Michigan Court Rules.

CHANGE OF ADDRESS: You are required to keep the court and interested persons informed in writing within 7 days of any change in your address.

DEATH OF PROTECTED INDIVIDUAL: If the protected individual dies during the conservatorship, you must give written notification to the court within 14 days of the individual's date of death. A final account must be filed within 56 days of the date of death.

The inventory and all accounts must be served on the required persons at the same time they are filed with the court. After serving the required persons, you must promptly file a proof of service with the court.

ATTENTION: The above provisions are reporting duties only and are not the only duties required of you. See MCL 700.5416 through 700.5433 for other duties of the conservator. Your failure to comply with the above reporting duties may require the court to appoint a special fiduciary in your place and to suspend your powers. This may result in your removal as fiduciary. **The court is prohibited by statute from giving you legal advice.**

KEEP THIS NOTICE FOR FUTURE REFERENCE

STATE OF MICHIGAN PROBATE COURT COUNTY OF OAKLAND	INVENTORY (CONSERVATORSHIP) <input type="checkbox"/> AMENDED	FILE NO. 2013-293,801-CA
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USE NOTE: The conservator must serve this completed inventory on all interested persons as required by Michigan Court Rules 5.105 and 5.125. Then the conservator must complete a proof of service (form PC 564) and file it and this inventory with the court.

In the matter of JUNE CLEAVER, Protected Individual

I, Theodore Cleaver, am the conservator and submit the following as a complete and accurate inventory of all the assets of the estate, including the fair market valuations as of the date of qualification as conservator. I have listed on this inventory any property the protected individual owns jointly or in common with others, including the type of ownership.

Name (type or print)

PERSONAL PROPERTY AND REAL PROPERTY DESCRIPTION If the property is owned by both the protected individual and others, specify the type of ownership in the description and check the box in the column "Total Value of Property." If the property has been used to secure a loan, show the nature and amount of the lien. Definitions and instructions for completing the inventory are on the other side.	LIEN AMOUNT	TOTAL VALUE OF PROPERTY (without reduction for lien)
Home at 25897 S. Winding Way, Waterford (legal Description attached); 2 x SEV = \$130,880.00 - subject to home equity loan	\$53,460.00	\$130,880.00 <input type="checkbox"/>
PNC checking account #xxxxxx0637; address: 994 W. Huron, Waterford MI, 48328		\$1,644.49 <input checked="" type="checkbox"/>
PNC money market account #xxxxxx0321		\$7522.95 <input checked="" type="checkbox"/>
Personal Property, clothing, furniture, and household goods		\$850.00 <input type="checkbox"/>
Diamond engagement/wedding ring set		\$1,200.00 <input type="checkbox"/>
2011 Ford Taurus (VIN #1K897URS378198) - subject to purchase money lien	\$12,750.00	\$15,625.00 <input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
TOTAL ASSETS		\$157,722.44

I declare under the penalties of perjury that this inventory has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

	05/21/2013
	Date
	<i>Theodore Cleaver</i>
Attorney signature	Signature
	Theodore Cleaver
Attorney name (type or print)	Name (type or print)
	19449 Maryland Lane
Address	Address
	Troy, MI 48084
City, state, zip	Telephone no.
	(248) 555-1953
	Telephone no.

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

FILED _____ **20** _____

SAMPLE

DEFINITIONS:

- **Real property** means land, including a building or house that is built on the land.
- **Personal property** means everything that a person owns except real property. Personal property includes bank accounts and checking accounts.

INSTRUCTIONS FOR COMPLETING THE INVENTORY:

1. List all real and personal property in the column **“Personal Property and Real Property Description.”**
2. When listing real property, provide the legal description of the property and the name of any other owner.
 - a. If real property has been used to secure a loan (including an equity line of credit), show the nature and amount of the lien.
 - b. If the value of real property is determined by an appraisal, include the appraiser’s name and address and a description of the property appraised.
 - c. Property that the protected person owns jointly or in common with others must be listed along with the type of ownership. The court may require additional information to support the value of property that is stated in the inventory.
3. When listing personal property, provide enough detail to adequately determine the value. Some items should be listed separately and some items should be combined under one category. Provide the name and address of each financial institution listed. The address for a financial institution shall be either that of the institution’s main headquarters or the branch used most frequently by the conservator.
 - a. Examples of items that should be listed and valued separately are:
 - Automobiles
 - Jewelry
 - Bank accounts
 - Antiques
 - Furniture
 - Any other individual item of high value (such as a fur coat)
 - Prepaid burial contracts
 - Life insurance (cash value)
 - Annuities
 - Mutual funds
 - Stocks and bonds
 - b. Examples of items that can be listed in categories are:
 - Household items such as dishes, flatware, curtains, linens, utensils, clothing, furnishings, etc. can be grouped into several categories or combined into one category.
 - Multiple copies or pieces of a specific item that have the same value such as stocks and bonds.
 - c. If personal property has been used to secure a loan, show the nature and amount of the lien.
 - d. If the value of personal property is determined by an appraisal, include the appraiser’s name and address and a description of the property appraised.
 - e. Property that the protected individual owns jointly or in common with others must be listed along with the type of ownership. The court may require additional information to support the value of property that is stated in the inventory.

SAMPLE

File #: 2013-293,801-CA

Legal Description

The following described premises situated in the Township of Waterford, County of Oakland, and State of Michigan, to-wit:

T2N, R10E, SEC 6 WARD CLEAVER SUB, LOTS 358 & 359

More commonly known as: 25897 S. Winding Way, Waterford, MI 48328,
Tax Item No. 14-21-367-001

NOTE: The legal description can be found on:

1. the deed
2. the property tax bill
3. the title insurance.

STATE OF MICHIGAN PROBATE COURT COUNTY OF OAKLAND	PROOF OF SERVICE	FILE NO. 2013-293,801-CA
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In the matter of JUNE CLEAVER, Protected Individual

1. Titles of the papers served or mailed: Inventory

2. According to the court rule, I served by first-class mail registered mail (copy of return receipt attached)
 certified mail (copy of return receipt attached) the papers described above on:

Name	Complete address of service	Date
June Cleaver	25897 S. Winding Way, Waterford, MI, 48328	May 21, 2013
Wally Cleaver	1313 Mockingbird Lane, Mt. Clemens, MI, 48033	May 21, 2013

3. According to court rule, I served by **personal service** the papers described above on:

Name	Complete address of service	Date and Time

4. After diligent search and inquiry, I have been unable to find and serve the following interested persons. I have served these persons by publication. Attached are copies of form PC 617.

I declare under the penalties of perjury that this proof of service has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Service fee \$	Miles traveled	Fee \$	
Incorrect address fee \$	Miles traveled	Fee \$	TOTAL FEE \$ 0.00

May 21, 2013

Date

Theodore Cleaver

Signature

Theodore Cleaver

Name (type or print)

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do no write below this line – For court use only

FILED _____ 20 _____

Approved, SCAO

JIS CODE: INV

STATE OF MICHIGAN PROBATE COURT COUNTY OF OAKLAND	INVENTORY (CONSERVATORSHIP) <input checked="" type="checkbox"/> AMENDED	FILE NO. <p align="center">2013-293,801-CA</p>
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USE NOTE: The conservator must serve this completed inventory on all interested persons as required by Michigan Court Rules 5.105 and 5.125. Then the conservator must complete a proof of service (form PC 564) and file it and this inventory with the court.

In the matter of JUNE CLEAVER, Protected Individual

I, Theodore Cleaver, am the conservator and submit the following as a complete and
Name (type or print)

accurate inventory of all the assets of the estate, including the fair market valuations as of the date of qualification as conservator. I have listed on this inventory any property the protected individual owns jointly or in common with others, including the type of ownership.

PERSONAL PROPERTY AND REAL PROPERTY DESCRIPTION If the property is owned by both the protected individual and others, specify the type of ownership in the description and check the box in the column "Total Value of Property." If the property has been used to secure a loan, show the nature and amount of the lien. Definitions and instructions for completing the inventory are on the other side.	LIEN AMOUNT	TOTAL VALUE OF PROPERTY (without reduction for lien)
Home at 25897 S. Winding Way, Waterford (legal Description attached); 2 x SEV = \$130,880.00 - subject to home equity loan	\$53,460.00	\$130,880.00 <input type="checkbox"/>
PNC checking account #xxxxxx0637; address: 994 W. Huron, Waterford, MI, 48328		\$1,644.49 <input checked="" type="checkbox"/>
PNC money market account #xxxxx0321		\$7522.95 <input checked="" type="checkbox"/>
Personal Property, clothing, furniture, and household goods		\$850.00 <input type="checkbox"/>
Diamond engagement/wedding ring set		\$1,200.00 <input type="checkbox"/>
2011 Ford Taurus (VIN #1K897URS378198) - subject to purchase money lien	\$12,750.00	\$15,625.00 <input type="checkbox"/>
PNC certificate of deposit #xxxxxx1845		\$19,357.22 <input type="checkbox"/>
Merril Lynch CMA Account xxx-xx8476 P.O. Box 1501 Pennington, NJ, 08534		\$72,219.03 <input type="checkbox"/>
Prudential Insurance, Life Insurance (cash value)		\$1,225.00 <input type="checkbox"/>
TOTAL ASSETS		\$250,514.69

I declare under the penalties of perjury that this inventory has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

	11/04/2013
Attorney signature	Date
Attorney name (type or print)	Theodore Cleaver
Address	19449 Maryland Lane
City, state, zip	Troy, MI 48084
Telephone no.	(248) 555-1953

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SAMPLE

DEFINITIONS:

- **Real property** means land, including a building or house that is built on the land.
- **Personal property** means everything that a person owns except real property. Personal property includes bank accounts and checking accounts.

INSTRUCTIONS FOR COMPLETING THE INVENTORY:

1. List all real and personal property in the column **“Personal Property and Real Property Description.”**
2. When listing real property, provide the legal description of the property and the name of any other owner.
 - a. If real property has been used to secure a loan (including an equity line of credit), show the nature and amount of the lien.
 - b. If the value of real property is determined by an appraisal, include the appraiser’s name and address and a description of the property appraised.
 - c. Property that the protected person owns jointly or in common with others must be listed along with the type of ownership. The court may require additional information to support the value of property that is stated in the inventory.
3. When listing personal property, provide enough detail to adequately determine the value. Some items should be listed separately and some items should be combined under one category. Provide the name and address of each financial institution listed. The address for a financial institution shall be either that of the institution’s main headquarters or the branch used most frequently by the conservator.
 - a. Examples of items that should be listed and valued separately are:
 - Automobiles
 - Jewelry
 - Bank accounts
 - Antiques
 - Furniture
 - Any other individual item of high value (such as a fur coat)
 - Prepaid burial contracts
 - Life insurance (cash value)
 - Annuities
 - Mutual funds
 - Stocks and bonds
 - b. Examples of items that can be listed in categories are:
 - Household items such as dishes, flatware, curtains, linens, utensils, clothing, furnishings, etc. can be grouped into several categories or combined into one category.
 - Multiple copies or pieces of a specific item that have the same value such as stocks and bonds.
 - c. If personal property has been used to secure a loan, show the nature and amount of the lien.
 - d. If the value of personal property is determined by an appraisal, include the appraiser’s name and address and a description of the property appraised.
 - e. Property that the protected individual owns jointly or in common with others must be listed along with the type of ownership. The court may require additional information to support the value of property that is stated in the inventory.

SAMPLE

File #: 2013-293,801-CA

Legal Description

The following described premises situated in the Township of Waterford, County of Oakland, and State of Michigan, to-wit:

T2N, R10E, SEC 6 WARD CLEAVER SUB, LOTS 358 & 359

More commonly known as: 25897 S. Winding Way, Waterford, MI 48328,
Tax Item No. 14-21-367-001

Approved, SCAO

JIS CODE: PSV

STATE OF MICHIGAN PROBATE COURT COUNTY OF OAKLAND	PROOF OF SERVICE	FILE NO. 2013-293,801-CA
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In the matter of JUNE CLEAVER, Protected Individual

1. Titles of the papers served or mailed: Amended Inventory

2. According to the court rule, I served by first-class mail registered mail (copy of return receipt attached)
 certified mail (copy of return receipt attached) the papers described above on:

Name	Complete address of service	Date
June Cleaver	25897 S. Winding Way, Waterford, MI, 48328	November 4, 2013
Wally Cleaver	1313 Mockingbird Lane, Mt. Clemens, MI 48033	November 4, 2013

3. According to court rule, I served by **personal service** the papers described above on:

Name	Complete address of service	Date and Time

4. After diligent search and inquiry, I have been unable to find and serve the following interested persons. I have served these persons by publication. Attached are copies of form PC 617.

I declare under the penalties of perjury that this proof of service has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Service fee \$	Miles traveled	Fee \$	
Incorrect address fee \$	Miles traveled	Fee \$	TOTAL FEE \$ 0.00

November 4, 2013

Date

Theodore Cleaver

Signature

Theodore Cleaver

Name (type or print)

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do no write below this line -- For court use only

FILED _____ 20 _____

SAMPLE

\$20 Filing Fee per Account

JIS CODE: ACC

Approved, SCAO

STATE OF MICHIGAN PROBATE COURT COUNTY OF OAKLAND	ACCOUNT OF FIDUCIARY, SHORT FORM <input checked="" type="checkbox"/> 1st Annual <input type="checkbox"/> Final <input type="checkbox"/> Interim Number <input type="checkbox"/> AMENDED	FILE NO. 2013-293,801-CA
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In the matter of JUNE CLEAVER, Protected Individual

In a guardianship or conservatorship, the ward's or protected individual's current address and telephone number are:

1234 Dixie Hwy., Waterford, MI, 48329, (248) 353-4291

I, Theodore Cleaver, am the Conservator
Name Title
 of the estate and submit the following as my account, which covers the period from 04/04/2013
Month, day, year
 to 04/04/2014 (may not exceed 12 months).
Month, day, year

COLUMN 1. INCOME, GAIN AND OTHER RECEIPTS		COLUMN 2. EXPENSES, LOSSES AND OTHER DISBURSEMENTS	
Social Security (\$886.00 x 12)	\$ 10,632.00	American House (\$1,650.00 x 12 + 383.92)	\$ 20,183.92
Pension (\$836.49 x 12)	10,037.88	Medications	2,384.63
PNC Checking interest	9.36	Dr. Lumpy Rutherford	1,863.21
PNC money market interest	504.74	Wally Cleaver (Guardian fees)	1,200.00
PNC CD interest	950.25	Clothing	873.13
State Farm insurance refund	283.13	BCBS Insurance	3,000.00
Comerica Bank CD #xxxx5665	81,515.62	Homeowner's Insurance	693.00
2340 Orchard Lake Rd., Sylvan, 48320		Charles Dewey - GAL fees	350.00
Gain on sale of jewelry	500.00	Probate fees (reimburse Conservator)	186.00
		Real property taxes	2,319.45
		See Attached	14,505.58
		Loss on sale of Taurus	2,000.00
Investment gain	N/A	Investment loss	N/A
Total Column 1	\$104,432.98	Total Column 2	\$49,558.92
(Enter on line 2b on page 2)		(Enter on line 2d on page 2)	

SEE SECOND PAGE

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

FILED _____ 20 _____

Deputy Register of Probate

SAMPLE

2. a. Balance on hand from last account, or value of inventory, if first account \$ 250,514.69
- b. Enter Total Column 1, Income, Gain, and Other Receipts, from the other side of this form \$ 104,432.98
- c. **Subtotal** (Add line 2.a to line 2.b and enter the amount here.) \$ 354,947.67
- d. Enter Total Column 2, Expenses, Losses, and Other Disbursements, from the other side of this form \$ 49,558.92
- e. Balance of assets on hand (Subtract line 2.d from line 2.c and enter the amount here.) \$ 305,442.09
 This line must equal the last line in item 3. (itemize assets below.)

3. The balance of assets on hand are as follows:

ITEMIZED ASSETS REMAINING AT END OF ACCOUNTING PERIOD	
PNC checking account	\$ 4,878.52
PNC money market account	8,027.69
PNC CD	20,307.47
See attached	272,208.41
Total balance on hand. This line must equal the last line in item 2.	
	\$ 305,442.09

Note: In guardianships and conservatorships, except as provided by MCR 5.409(C)(4), you must present to the court copies of corresponding financial institution statements or you must file with the court a verification of funds on deposit, either of which must reflect the value of all liquid assets held by a financial institution dated within 30 days of the end of the accounting period.

4. The interested persons, addresses, and their representatives are identical to those appearing on the initial application/petition, except as follows: (For each person whose address changed, list the name and new address; attach separate sheet if necessary.)

June Cleaver, 1234 Dixie Hwy., Waterford, MI, 48329, (248) 353-4291; Wally Cleaver, 8245 Sunset Blvd., Novi, Mi, 48099

5. This account lists all income and other receipts and expenses and other disbursements that have come to my knowledge.
6. This account is not being filed with the court.
7. My fiduciary fees incurred during this accounting period (including fees that have already been approved and/or paid for this accounting period) are \$ 176.00. Attached is a written description of the services performed.
8. Attorney fees incurred during this accounting period (including fees that have already been approved and/or paid for this accounting period) are \$ _____. Attached is a written description of the services performed.

I declare under the penalties of perjury that this account has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

	Date May 24, 2014
Attorney signature	<i>Theodore Cleaver</i> Fiduciary signature
Attorney name (type or print)	Theodore Cleaver Fiduciary name (type or print)
Address	19449 Maryland Lane Address
City, state, zip	Troy, MI, 48084 (248) 555-1953 City, state, zip Telephone no.
Telephone no.	

(For accounts that must be filed with the court.)

NOTICE TO INTERESTED PERSONS

1. You must bring to the court's attention any objection you have to this account. Except in guardianships and conservatorships, the court does not normally review the account without an objection.
2. You have the right to review proofs of income and disbursements at a time reasonably convenient to the fiduciary and yourself.
3. You may object to all or part of an accounting by filing a written objection with the court before the court allows the account. You must pay a \$20.00 filing fee to the court when you file the objection. (See MCR 5.310[C])
4. If an objection is filed and is not otherwise resolved, the court will conduct a hearing on the objection.
5. You must serve the objection on the fiduciary or his/her attorney.

SAMPLE

File #: 2013-293,801-CA

EXPENSES, continued.....

Food	\$875.92
DTE (house electricity)	\$394.20
Consumer's Power (house gas)	\$285.84
Ford Motor Credit (car payments)	\$742.50
Ford Motor Credit (car payoff)	<u>\$12,207.12</u>
TOTAL	\$14,505.58

SAMPLE

File #: 2013-293,801-CA

ITEMIZED ASSETS REMAINING AT THE END OF ACCOUNTING PERIOD (continued):

Residence at 25897 S. Winding Way, Waterford	\$130,880.00
Personal Property	\$850.00
Comerica CD	\$81,515.62
Merrill Lynch CMA Account	<u>\$58,962.79</u>
TOTAL this page	\$272,208.41

SAMPLE

File #: 2013-293,801-CA

Statement of Services by Conservator

DATE	SERVICES	TIME (hours)
04/04/13	Set up bank account	1.0
04/05/13	Paid monthly bills and balance checkbook	1.0
05/02/13	Paid monthly bills and balance checkbook	1.0
05/02/13	Worked on inventory	.75
05/21/13	Completed inventory and faxed to court	.5
06/06/13	Paid monthly bills and balance checkbook	.75
07/05/13	Paid monthly bills and balance checkbook	.5
08/01/13	Paid monthly bills and balance checkbook	.5
08/18/13	Renewed CD at PNC	.5
09/05/13	Paid monthly bills and balance checkbook	.75
10/03/13	Paid monthly bills and balance checkbook	.5
10/16/13	Prepared amended inventory	.3
11/04/13	Faxed amended inventory to court	.1
11/07/13	Paid monthly bills and balance checkbook	.75
12/05/13	Paid monthly bills and balance checkbook	.5
12/18/13	Renewed CD at Comerica	1.0
01/05/14	Paid monthly bills and balance checkbook	.5
01/05/14	Placed ad on Craigslist to sell car	.2
01/21/14	Showed car to several potential buyers	3.0
02/01/14	Paid monthly bills and balance checkbook	1.5
02/01/14	Took car to dealership to sell	.5
03/04/14	Paid monthly bills and balance checkbook	.5
03/30/14	Took rings to jeweler; sold rings	.5
04/02/14	Paid monthly bills and balance checkbook	.5
TOTAL		17.6
FEES	Hours times \$10.00 per hour	\$176.00

SAMPLE



249 Fifth Avenue, One PNC
Plaza, Pittsburgh, PA

PAGE 1 OF 2

FOR ACCOUNT INQUIRIES, PLEASE CALL 800-925-9259

PREFERRED INTEREST CHECKING

ACCOUNT NUMBER	0200100637	BEGINNING BALANCE	2,349.59
BEGINNING DATE	MARCH 09, 2014	DEPOSITS/CREDITS	2,501.65
ENDING DATE	APRIL 06, 2014	CHECKS/DEBITS	1,644.49
AVERAGE BALANCE	3,935.40	ENDING BALANCE	4,878.52
INTEREST PAID Y-T-D	4.50	INTEREST EARNED THIS PERIOD	1.65
		ANNUAL PERCENTAGE YIELD EARNED	.54%

DEPOSITS/CREDITS

<u>DATE</u>	<u>AMOUNT</u>	<u>DESCRIPTION</u>
03/15	2,500.00	DEPOSIT
04/06	1.65	INTEREST PAID

CHECKS

<u>DATE</u>	<u>CHECK NO.</u>	<u>AMOUNT</u>	<u>DATE</u>	<u>CHECK NO.</u>	<u>AMOUNT</u>
03/31	00354	1,644.49			

DAILY BALANCE

<u>DATE</u>	<u>BALANCE</u>	<u>DATE</u>	<u>BALANCE</u>	<u>DATE</u>	<u>BALANCE</u>
03/15	4,849.59	03/31	3,205.10	04/06	4,878.52

RELATIONSHIP MONEY MARKET SAVINGS

ACCOUNT NUMBER	0200100321	BEGINNING DATE	MARCH 09, 2014
		ENDING DATE	APRIL 06, 2014
INTEREST PAID Y-T-D	10.86	INTEREST EARNED THIS PERIOD	3.50
		ANNUAL PERCENTAGE YIELD EARNED	.55%

<u>DATE</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>	<u>BALANCE</u>
03/09	BEGINNING BALANCE		8,023.95
03/31	INTEREST PAID	3.74	8,027.69
04/06	ENDING BALANCE		8,027.69

CERTIFICATE OF DEPOSIT

ACCOUNT NUMBER	0200100321	AS OF DATE	APRIL 06, 2014
ACCOUNT TERM	24 MONTHS	NEXT RENEWAL DATE	NOVEMBER 15, 2016
INTEREST PAID Y-T-D	231.04	NEXT RENEWAL AMOUNT	20,000.00

SAMPLE



249 Fifth Avenue, One PNC
Plaza, Pittsburgh, PA

PAGE 2 OF 2

DATE	DESCRIPTION	AMOUNT	BALANCE
03/09	BEGINNING BALANCE		20,235.31
03/15	INTEREST PAID	72.16	20,307.47
04/06	ENDING BALANCE		20,307.47

SAMPLE

ACPR	GEIN 7 TDA	TDA GENERAL INQUIRY	109/02/10	9.44.56	
ACTION INQ	CO 10002 OP	MS	ACTION SUCCESSFUL		
PROD CODE CDA	ACCT 3851 5665	ACCT COND HARD HOLD			
		SHORT NAME			
CUSTOMER NUMBER		FA - FIXED	365/365	SIMPLE CDA	7-29
SSN		PLEDGES? N	WH CD PC	ACCT TYPE	01
STATUS	ACTIVE	BRANCH	80309	CST CTR	91120 SUB ACCT TYPE 01
DATE CLOSED		ORG BR	80309	OFFICER	OFF00 REGION CD 0001
RENEWAL AMOUNT			81,515.62	LAST RENEWAL DATE	109/02/12
CURRENT VALUE			81,515.62	NEXT RENEWAL DATE	109/02/19
INTEREST ACCRUED			.56	INTEREST RATE	.25000
RESTRAINT AMT			.00	RATE SPREAD	.00000
				TERM CODE	7 D
INTEREST PD YTD			29.70	B NOTICE INDICATOR	N
FED WITHHOLD YTD			0.00	C NOTICE INDICATOR	N
PENALTY YTD			0.00	W8/W9 FLAG	N
FEE YTD			0.00	DISTRIBUTION STATUS	N
NEGOTIABLE RATE?	N	NEGO CERT?	N	INT PAY CYCLE CODE	00 PAY METH TA
OVERRIDE RATE?	N			ACCRUAL BASE	365 YEAR BASE 365
INTEREST METHOD	SIMPLE				
PROJECTED RATES	.000	.000	.000	.000	.000 .000

Sherrie M. Webb 5/8/14

**COMERICA BANK
2340 ORCHARD LAKE RD.
SYLVAN LAKE, MI 48320**



Online at www.merrilledge.com

Account Number: 8J5-258476

Theodore Cleaver
 Conservator for June Cleaver,
 Protected Individual
 19449 Maryland Lane
 Troy, MI 48084

Net Portfolio Value: \$58,962.79

Your Merrill Lynch Office:
 Merrill EDGE Advisory Center™
 NJ2-140-02-17
 P.O. BOX 1501
 PENNINGTON, NJ 08534

**Investment Advice and Guidance and
 Questions About Your Statement,**
 Mon-Fri: 7:30 a.m. - 1:00 a.m. ET:
 (888) ML-INVEST (654-6837)
 24-Hour Account Information & Services
 April 30, 2014

CMA® FOR TRUST ACCOUNT

ASSETS	September 30	August 30
Cash/Money Accounts	4.71	4.71
Fixed Income	-	-
Equities	-	-
Mutual Funds	58,958.08	58,856.79
Options	-	-
Other	-	-
<i>Subtotal (Long Portfolio)</i>	58,962.79	58,861.50
TOTAL ASSETS	\$58,962.79	\$58,861.50
LIABILITIES		
Debit Balance	-	-
Short Market Value	-	-
TOTAL LIABILITIES	-	-
NET PORTFOLIO VALUE	\$58,962.79	\$58,861.50

CASH FLOW	This Statement	Year to Date
Opening Cash/Money Accounts	\$4.71	
CREDITS		
Funds Received	-	.32
Electronic Transfers	-	-
Other Credits	-	-
<i>Subtotal</i>	-	-
DEBITS		
Electronic Transfers	-	-
Margin Interest Charged	-	-
Other Debits	-	(125.00)
Visa Purchases (debits)	-	-
ATM/Cash Advances	-	-
Checks Written/Bill Payment	-	-
<i>Subtotal</i>	-	(125.00)
Net Cash Flow	-	(\$125.00)
Dividends/Interest Income	167.17	1,267.36
Dividend Reinvestments	(167.17)	(1,267.36)
Security Purchases/Debits	-	-
Security Sales/Credits	-	108.48
Closing Cash/Money Accounts	\$4.71	
Securities You Transferred In/Out	8.96	36.00

Merrill Edge is the marketing name for two businesses: Merrill Edge Advisory Center, which offers team-based advice and guidance brokerage services; and a self-directed online investing platform. Both are made available through Merrill Lynch, Pierce, Fenner & Smith Incorporated (MLPF&S). MLPF&S is a registered broker-dealer, Member SIPC and a wholly owned subsidiary of Bank of America Corporation. Investment products:

Are Not FDIC Insured | Are Not Bank Guaranteed | May Lose Value



Approved, SCAO

JIS CODE: PSV

STATE OF MICHIGAN
PROBATE COURT
COUNTY OF OAKLAND

PROOF OF SERVICE

FILE NO.

2013-293,801-CA

In the matter of JUNE CLEAVER, Protected Individual

1. Titles of the papers served or mailed: 1st Annual Account

2. According to the court rule, I served by first-class mail registered mail (copy of return receipt attached)
 certified mail (copy of return receipt attached) the papers described above on:

Name	Complete address of service	Date
June Cleaver	1234 Dixie Hwy., Waterford, MI, 48329	May 24, 2014
Wally Cleaver	8245 Sunset Blvd., Novi, MI, 48099	May 24, 2014

3. According to court rule, I served by **personal service** the papers described above on:

Name	Complete address of service	Date and Time

4. After diligent search and inquiry, I have been unable to find and serve the following interested persons. I have served these persons by publication. Attached are copies of form PC 617.

I declare under the penalties of perjury that this proof of service has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Service fee	Miles traveled	Fee	TOTAL FEE
\$		\$	
Incorrect address fee	Miles traveled	Fee	
\$		\$	\$ 0.00

May 24, 2014
Date
Theodore Cleaver
Signature
Theodore Cleaver
Name (type or print)

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left hand corner of the form.

Do not write below this line - For court use only

FILED _____ 20 _____

SAMPLE

Letters of Conservatorship

JIS CODE: LET

STATE OF MICHIGAN PROBATE COURT OAKLAND COUNTY CIRCUIT COURT - FAMILY DIVISION	LETTERS OF CONSERVATORSHIP	FILE NO. 2013-293,801-CA
---	----------------------------	---------------------------------

Estate of JUNE CLEAVER Protected Individual

To: Name and address
Theodore Cleaver
19449 Maryland Lane
Troy, MI 48084

Conservator's telephone no.
248-555-1953

You have been appointed limited conservator(s) conservator(s) of the estate and are granted power to take possession, collect, preserve, manage, and dispose of property of the estate according to law and to perform all acts permitted or required by statute, court rule, and orders of this court unless limited below.

TIME LIMIT: These letters of authority expire and all powers shall terminate at midnight May 30, 2014
Date

- The conservator shall have authority with respect to all assets of the estate.
- Real estate or ownership interest in a business entity is excluded from your responsibilities in your acceptance of appointment.
- The conservator shall have authority with respect to the following assets only:

Restrictions:
The conservator shall not sell or otherwise dispose of the protected individual's principal dwelling, real property, or interest in real property or mortgage, pledge or cause a lien to be placed on any such property without a prior court order of approval.

*Embossed seal will
be placed here*

April 4, 2013
Date

Daniel A. O'Brien
Judge Bar no. 71

Attorney name (type or print) Bar no.

Address

City, state, zip Telephone no.

These Letters of Authority
are extended to May 30, 2015
and are in full force and
effect as of this date May 14, 2014
Julie A. Kitter
Deputy Probate Register

SEE NOTICE OF DUTIES ON SECOND PAGE

I certify that I have compared this copy with the original on file and that it is a correct copy of the original, and on this date, these letters are in full force and effect.

Date Deputy probate register

Do not write below this line - For court use only

FILED April 4 20 13
Julie A. Kitter
Deputy Register of Probate

SAMPLE

NOTICE TO CONSERVATOR OF CERTAIN DUTIES

FILE NO. 2013-293,801-CA

AS REQUIRED BY LAW AND MICHIGAN COURT RULES, YOU ARE NOTIFIED:

You are required to file with this court the following written documents using the indicated form(s) at the indicated times. Forms are available at the court or online at www.oakgov.com/probate.

INVENTORY: As the conservator, you are required by law to prepare an inventory of the assets of the estate that you have been given authority over within 56 days from the date of your appointment. You must also provide a copy of the inventory to the protected individual if the individual can be located and if the minor is 14 years of age or older and to interested persons as specified in the Michigan Court Rules. You must also provide the name and address of each financial institution listed on your inventory at the time the inventory is presented to the court. The address for a financial institution shall either that of the institution's main headquarters or the branch used most frequently by the conservator.

Your inventory is due on May 30, 2013 . (May use form PC 574, "Inventory, Conservatorship.")
Date

ACCOUNTS: As the conservator, you must file an annual account unless otherwise ordered by the court. An accounting must be filed within 56 days after the end of the accounting period. The accounting period ends on the anniversary date of the issuance of the letters of authority, unless the conservator selects another accounting period or unless the court orders otherwise. If you select another accounting period, notice of that selection shall be filed with the court. The accounting period may be a calendar year or a fiscal year ending on the last day of a month. You may use the same accounting period as that used for income tax reporting, and the first accounting period may be less than a year but not longer than a year. On filing, the account may be set for hearing or the hearing may be deferred to a later time.

Your annual account is due on May 30 of each year. (Use form PC 583 for annual; PC 648 for a Minor's Final Account)
Date

Your annual account should cover events from: April 4 to: April 4

In addition, you must provide a copy of the account to the protected individual if the individual can be located and is 14 years of age or older, and to interested persons as specified in the Michigan Court Rules.

CHANGE OF ADDRESS: You are required to keep the court and interested persons informed in writing within 7 days of any change in your address.

DEATH OF PROTECTED INDIVIDUAL: If the protected individual dies during the conservatorship, you must give written notification to the court within 14 days of the individual's date of death. A final account must be filed within 56 days of the date of death.

The inventory and all accounts must be served on the required persons at the same time they are filed with the court. After serving the required persons, you must promptly file a proof of service with the court.

ATTENTION: The above provisions are reporting duties only and are not the only duties required of you. See MCL 700.5416 through 700.5433 for other duties of the conservator. Your failure to comply with the above reporting duties may require the court to appoint a special fiduciary in your place and to suspend your powers. This may result in your removal as fiduciary. The court is prohibited by statute from giving you legal advice.

KEEP THIS NOTICE FOR FUTURE REFERENCE

Approved, SCAO

STATE OF MICHIGAN PROBATE COURT OAKLAND COUNTY CIRCUIT COURT – FAMILY DIVISION	PETITION TO ALLOW ACCOUNT(S)	FILE NO. 2013-293,801-CA
---	------------------------------	---------------------------------

In the matter of June Cleaver, Protected Individual

- One or more accounts listing all income and other receipts and expenses and other disbursements, which have come to my knowledge during the accounting period(s), have been filed with the court.
- The interested persons, addresses, and their representatives are identical to those appearing on the initial application/petition, excepts as follows: (for each person whose address changed, list the name and new address; attach separate sheet if necessary)

June Cleaver, 1234 Dixie Hwy., Waterford, MI, 48329

Wally Cleaver, 8245 Sunset Blvd., Novi, MI, 48099

- The attached accounts include:
 - a. attorney fees and costs in the amount of \$ _____.
 - b. fiduciary fees and expenses in the amount of \$ 176.00.

I REQUEST:

- The court approve my fees and expenses and attorney fees and costs in the amount(s) stated above as set forth in the itemized statements attached to the account.
- That the account(s) be allowed as my
 - interim account.
 - 1st Annual account(s).
specify whether 1st, 2nd, 3rd, annual, or final
- That I be discharged. That bond be canceled.
 That the estate be continued. closed.

I declare under the penalties of perjury that this petition has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

 Attorney signature

 Attorney name (type or print) Bar no.

 Address

 City, state, zip Telephone no.

May 24, 2014
 Date

Theodore Cleaver
 Fiduciary signature

Theodore Cleaver
 Fiduciary name (type or print)

19449 Maryland Lane
 Address

Troy, MI, 48084 (248) 555-1953
 City, state, zip Telephone no.

Do not write below this line – For court use only

FILED _____ 20 _____

Deputy Register of Probate

SAMPLE

No Filing Fee

Approved, SCAO

JIS CODE: NOH

STATE OF MICHIGAN PROBATE COURT COUNTY OF OAKLAND	NOTICE OF HEARING	FILE NO. 2013-293,801-CA
---	-------------------	---------------------------------

In the matter of JUNE CLEAVER, Protected Individual

TAKE NOTICE: A hearing will be held on _____ at _____ A.M.,
Date Time
at 1200 N. Telegraph Road Pontiac, MI 48341 before Judge Daniel A. O'Brien P42120
Location Bar no.

for the following purpose(s): (state the nature of the hearing)

Petition to Allow the 1st Annual Account of Theodore Cleaver, Conservator.

If you require special accommodations to use the court because of a disability, or if you require a foreign language interpreter to help you fully participate in court proceedings, please contact the court immediately to make arrangements.

Attorney name	Bar no.	<u>05/24/2014</u> Date
Address	City, state, zip	<u>Theodore Cleaver</u> Petitioner name <u>19449 Maryland Blvd.</u> Address <u>Troy, MI, 48084</u> <u>(248) 555-1953</u> City, state, zip Telephone no.

USE NOTE TO COURT: If this hearing is for a guardianship matter involving an Indian child as defined in MCR 3.002(5), you must comply with MCR 5.109(2).

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line – For court use only

FILED _____ **20** _____

Deputy Probate Register

STATE OF MICHIGAN PROBATE COURT COUNTY OF OAKLAND	PROOF OF SERVICE	FILE NO. 2013-293,801-CA
---	------------------	---------------------------------

In the matter of JUNE CLEAVER, Protected Individual

1. Titles of the papers served or mailed: Petition to Allow 1st Annual Account and Notice of Hearing

2. According to the court rule, I served by first-class mail registered mail (copy of return receipt attached)
 certified mail (copy of return receipt attached) the papers described above on:

Name	Complete address of service	Date
June Cleaver	1234 Dixie Hwy., Waterford, MI, 48329	June 3, 2014
Wally Cleaver	8245 Sunset Blvd., Novi, MI, 48099	June 3, 2014

3. According to court rule, I served by **personal service** the papers described above on:

Name	Complete address of service	Date and Time

4. After diligent search and inquiry, I have been unable to find and serve the following interested persons. I have served these persons by publication. Attached are copies of form PC 617.

I declare under the penalties of perjury that this proof of service has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Service fee \$	Miles traveled	Fee \$	
Incorrect address fee \$	Miles traveled	Fee \$	TOTAL FEE \$ 0.00

June 3, 2014

Date

Theodore Cleaver

Signature

Theodore Cleaver

Name (type or print)

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

FILED _____ 20 _____

Approved, SCAO

STATE OF MICHIGAN
PROBATE COURT
COUNTY OF OAKLAND

PETITION REGARDING
REAL ESTATE/DWELLING

FILE NO.
2013-293,801-CA

NOTE: Do not use this form in decedent's estates.

Estate of JUNE CLEAVER, Protected Individual

- 1. I am the Conservator of this estate.
Specify conservator or guardian
2. I intend to sell dispose of mortgage pledge cause a lien to be placed on the protected individual's principal dwelling, real property, or interest in real property described as follows (provide legal description or VIN number of titled property):

See Attached

for the purpose of Liquidating Assets

to William Whitney for \$ 145,000.00 on the following
Name (type or print)

terms and conditions: standard purchase agreement; buyer to obtain mortgage financing

Attached is a copy of the most recent assessor's statement or tax statement showing the state equalized value of the property or documentation showing the current value of the titled property, which is \$ 71,570.00

3. It is in the protected individual's best interests to grant this petition for the following reasons: Liquidate assets to pay for daily living expenses

4. The value of remaining personal property is \$ 115,579.30 and real property is \$ 130,880.00
The amount of unpaid debts and taxes is \$ 3,289.45. The fiduciary is currently bonded for a total amount of \$ 0.00

5. The protected individual's monthly income is \$ 1,722.49 and monthly expenses are \$ 2,709.78

6. The interested parties, their addresses and their representatives are identical to those appearing on the initial petition except as follows: (For each person whose address changed, list the name and new address; attach separate sheet if necessary.)

{Put any new addresses here}

(PLEASE SEE OTHER SIDE)

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

Bond is set at \$

FILED 20

Date:

Deputy Register of Probate

Authorized signature: 39

SAMPLE

7. I request that the court approve this sale of disposal of mortgage on pledge of placement of lien on the property described above and determine whether a bond needs to be filed.

I declare under the penalties of perjury that this petition has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Attorney signature

Attorney Name (type or print)

Bar no.

Address

City, state, zip

Telephone no.

September 16, 2014

Date

Theodore Pleaves

Signature

19449 Maryland Lane

Address

Troy, MI, 48084

City, state, zip

(248) 555-1953

Telephone no.

SAMPLE

File #: 2013-293,801-CA

Legal Description

The following described premises situated in the Township of Waterford, County of Oakland, and State of Michigan, to-wit:

T2N, R10E, SEC 6 WARD CLEAVER SUB, LOTS 358 & 359

More commonly known as: 25897 S. Winding Way, Waterford, MI 48328,
Tax Item No. 14-21-367-001

SAMPLE

If paying by mail, please return this portion in the return envelope along with your payment.

TAX DUE DATE JULY 1, 2014
Payable July 1 – Sept. 14, 2014 without interest

The Treasurer's Department will send you a receipted copy.

To pay in person, please bring this entire statement in with your payment.

TOTAL TAX	PENALTY & INT.	TOTAL PAID	BALANCE
1,269.15			

SEE REVERSE SIDE
For All Payment Options and Additional Information

25897 S. Winding Way
Waterford, MI 48328

PARCEL I.D. NUMBER
14-21-367-001

WARNING: Check your Deed before paying your TAXES. You are responsible if you pay on wrong parcel.

2014 SUMMER TAX STATEMENT

CHARTER TOWNSHIP OF: WATERFORD
4200 Telegraph Rd./PO Box 488 Bloomfield Hills, MI 48303-0489

CODE #	H.P.R. TAX BASE	PARCEL I.D. NUMBER/SCHOOL DIST.	
32426	0	14-21-367-001	
% DECLARED AS H.P.R.	NON-H.P.R. TAX BASE	TAXABLE VALUE	STATE EQUALIZED VALUE
0%	38,340	38,340	71,570
TAX DESCRIPTION	RATE PER \$1000	AMOUNT	
INTERMEDIATE	3.36900	129.15	
COLLEGE	1.58440	60.74	
STATE EDUCATION	6.00000	230.04	
SCHOOL OPERATING	18.00000	690.12	
SCHOOL DEBT	1.35000	51.75	
COUNTY OPERATING	2.80000	107.35	
ADMIN FEE	0.0000	0.00	

PAYABLE JULY 1, 2014 – SEPT. 14, 2014
1% interest September 15- September 30th, 2014,
plus 1% interest per month thereafter.
3% Penalty after February 14, 2015.

25897 S. Winding Way
Waterford, MI 48328

Property Address:
25897 S. Winding Way

Partial Description of Property
T2N, R10E, SEC 6 Ward Cleaver Sub
LOTS 358 & 359

H.P.R. = HOMEOWNER'S PRINCIPAL RESIDENCE

PAYMENTS BY MAIL WILL BE RECORDED ON THE DATE RECEIVED,
NOT ON THE DATE POSTMARKED.

POSTMARKS WILL NOT BE ACCEPTED.

Failure to receive your tax bill does not waive interest and/or penalties.

Checks accepted only as a conditional payment. If not honored by Bank, tax is unpaid and subject to penalties.

SAMPLE

No Filing Fee

Approved, SCAO

JIS CODE: NOH

STATE OF MICHIGAN PROBATE COURT COUNTY OF OAKLAND	NOTICE OF HEARING	FILE NO. 2013-293,801-CA
---	-------------------	---------------------------------

In the matter of JUNE CLEAVER, Protected Individual

TAKE NOTICE: A hearing will be held on _____ at _____ A.M.,
Date Time
 at 1200 N Telegraph Road · Pontiac, MI 48341 before Judge Daniel A. O'Brien P42120
Location Bar no.

for the following purpose(s): (state the nature of the hearing)
 Petition Regarding Real Estate/Dwelling by Theodore Cleaver, Conservator.

If you require special accommodations to use the court because of a disability, or if you require a foreign language interpreter to help you fully participate in court proceedings, please contact the court immediately to make arrangements.

_____	_____	09/16/2014	_____
Attorney name	Bar no.	Date	
_____	_____	Theodore Cleaver	_____
Address		Petitioner name	
_____	_____	19449 Maryland Blvd.	_____
City, state, zip	Telephone no.	Address	
		Troy, MI, 48094	(248) 555-1953
		City, state, zip	Telephone no.

USE NOTE TO COURT: If this hearing is for a guardianship matter involving an Indian child as defined in MCR 3.002(5), you must comply with MCR 5.109(2).

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line – For court use only

FILED _____ 20 _____

Deputy Probate Register

STATE OF MICHIGAN PROBATE COURT COUNTY OF OAKLAND	PROOF OF SERVICE	FILE NO. 2013-293,801-CA
---	------------------	---------------------------------

In the matter of JUNE CLEAVER, Protected Individual

1. Titles of the papers served or mailed: Petition for Approval of Sale of Real Estate, and Notice of Hearing

2. According to the court rule, I served by first-class mail registered mail (copy of return receipt attached)
 certified mail (copy of return receipt attached) the papers described above on:

Name	Complete address of service	Date
June Cleaver	1234 Dixie Hwy., Waterford, MI, 48329	September 16, 2014
Wally Cleaver	8245 Sunset Blvd., Novi, MI, 48099	September 16, 2014

3. According to court rule, I served by **personal service** the papers described above on:

Name	Complete address of service	Date and Time

4. After diligent search and inquiry, I have been unable to find and serve the following interested persons. I have served these persons by publication. Attached are copies of form PC 617.

I declare under the penalties of perjury that this proof of service has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Service fee \$	Miles traveled	Fee \$	
Incorrect address fee \$	Miles traveled	Fee \$	TOTAL FEE \$ 0.00

September 16, 2014

Date

Theodore Cleaver

Signature

Theodore Cleaver

Name (type or print)

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do no write below this line - For court use only

FILED _____ 20 _____

Deputy Register of Probate

SAMPLE

Approved, SCAO

JIS CODE: NOT

STATE OF MICHIGAN
PROBATE COURT
OAKLAND COUNTY
CIRCUIT COURT -- FAMILY DIVISION

NOTICE OF DEFICIENCY

FILE NO.

2013-293,801-CA

Court address

1200 N. Telegraph Rd., Pontiac, MI 48341-0457

Court telephone no.

(248)858-0260

In the matter of JUNE CLEAVER, Protected Individual

To: Fiduciary
Theodore Cleaver
19449 Maryland Lane
Troy, MI 48084

It appears from a review of court files:

- You have failed to submit sufficient information to adequately determine the inventory fee. It must be filed at once.
Your "Inventory" has not been filed. Form PC 577 Form PC 674 must be filed at once.
You have failed to pay the inventory fee. It must be paid at once.
[X] Your Annual account (form PC 583, PC 584, or PC 648) is overdue. It must be filed at once.
Your "Annual Report of Guardian on Condition of Minor" (form PC 654) has not been filed. It must be filed at once.
Your "Annual Report of Guardian on Condition of Legally Incapacitated Individual" (form PC 634) has not been filed. It must be filed at once.
Your "Report of Guardian on Condition of Person with Developmental Disability" (form PC 663) has not been filed. It must be filed at once.
Other:

As required by court rule issued by the Michigan Supreme Court, YOU ARE NOTIFIED:

- [X] to correct the deficiency within 28 days from the date of this notice.
to appear in person before this court on Date for a conference.

PLEASE DO NOT DISREGARD THIS NOTICE: The above provisions were adopted by the Michigan Supreme Court and are mandatory. If you do not comply with this notice, the court may have to suspend your powers and appoint a special fiduciary in your place. This may result in your removal as fiduciary. You may also be subject to contempt of court proceedings.

DATE OF NOTICE: June 5, 2015

Julie A. Potts
Deputy probate register/clerk

If you require special accommodations to use the court because of a disability, or if you require a foreign language interpreter to help you to fully participate in court proceedings, please contact the court immediately to make arrangements.

Do not write below this line - For court use only

Copies mailed to:
Fiduciary
Attorney of record
Sureties

FILED 20

Date

Deputy Register of Probate

By

OAKLAND COUNTY PROBATE COURT
Notice to Delinquent and Suspended Fiduciaries
Pursuant to MCR 5.203

Delinquent

If you have received a Notice of Deficiency (PC 600), you have failed to comply with some fiduciary duty. You are considered “delinquent.” The checked boxes on the Notice tell you what you have to file or do.

- You have 28 days from the date of the Notice to comply.
- If you do not file or do what you are supposed to within 28 days of the Notice, the court will automatically give you one 28-day extension. It is best to take care of the deficiency as soon as possible.
- If you can not take care of the deficiency within the combined 56 day period, you may need a second 28-day extension. You must request it in writing using OCPC Form 1063 Request for Extension of Time for Compliance.

Suspended

If you still do not file or do what you are supposed to, the court will **suspend** you. If that happens, you will lose your powers as fiduciary until you do everything listed here and you are reinstated by the court.

- You must comply with the Notice of Deficiency requirements.
- You must also file a Petition for Reinstatement (PC 603). It will be set for hearing unless Waiver/Consents (PC 561) from all interested persons are presented prior to the hearing.
- All necessary filing fees must be submitted with the delinquent documents and the Petition for Reinstatement.

Oakland County Probate Court

1200 N. Telegraph Rd.

Pontiac, MI 48341

Tel: (248) 858-0260

Fax: (248) 452-2016

****NOTE OUR HOURS: Monday through Friday 8:00 a.m. to 4:30 p.m.****

For forms, please see our website at:

www.oakgov.com/probate/form_application

Click on “In House Forms” for OCPC Form 1063

Click on “SCAO Forms” for PCs including 561 and 603

Issued 9/05/Rev. 1/07

SAMPLE

OAKLAND COUNTY PROBATE COURT
1200 N. TELEGRAPH RD
PONTIAC, MI 48341-0457
248/858-0260

ORDER SUSPENDING POWERS OF FIDUCIARY AND NOTICE

THEODORE CLEAVER
19449 MARYLAND LANE
TROY, MI 48084

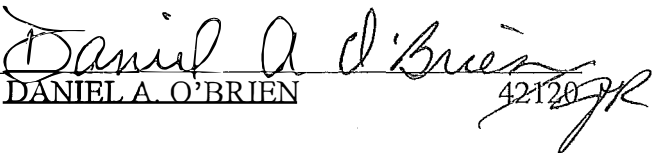
IN THE MATTER OF JUNE CLEAVER
CASE: 2013 0000392801 CA

A review of the court's file indicates that the fiduciary has failed to correct the deficiency or omission of which he/she has been notified, therefore:

IT IS ORDERED that the powers of the fiduciary are hereby suspended until further order of the court in accordance with Michigan Court Rule 5.203.

The question of personal liability for any loss to the estate as provided by MCL 700.1308 is subject to a determination at the time of a hearing on the final account, if required. You are hereby notified as parties of interest that the powers of the fiduciary have been suspended until further order of the court. Please arrange for further administration of this estate.

DATE: 8/10/15


Judge DANIEL A. O'BRIEN 42120 JR

MCR 5.203 (E) (3)

STATE OF MICHIGAN
PROBATE COURT
COUNTY OF OAKLAND

PETITION AND ORDER

FILE NO.

In the matter of _____

- 1. I am interested in this matter and make this petition as _____
State interest/relationship
- 2. The interested persons, addresses, and their representatives are identical to those appearing on the initial application/petition, except as follows: (for each person whose address changed, list the name and new address; attach separate sheet if necessary)

3. I state: (state facts)

4. I REQUEST that:

I declare under the penalties of perjury that this petition has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Date

Attorney signature

Petitioner Signature

Name (type or print) Bar no.

Petitioner name (type or print)

Address

Address

City, state, zip Telephone no.

City, state, zip Telephone no.

ORDER

IT IS ORDERED that the above petition is granted. denied. dismissed granted in part as follows:

Date

Judge Bar no.

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

FILED _____ 20 _____

Deputy Register of Probate

STATE OF MICHIGAN PROBATE COURT COUNTY OF OAKLAND	PETITION AND ORDER TO USE FUNDS (CONSERVATORSHIP)	FILE NO.
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In the matter of _____

PETITION

1. I, _____, am conservator of the estate.
Name

2. The interested persons, addresses, and their representatives are identical to those appearing on the initial application/petition, except as follows: (For each person whose address changed, list the name and new address; attach separate sheet if necessary.)

3. As of _____ the ward's total assets are \$ _____.
Date

4. **I REQUEST** permission to withdraw \$ _____ of the ward's money from _____
 to be used as follows for the benefit of the ward: Account no. and name of financial institution _____

I declare under the penalties of perjury that this petition has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

	<small>Date</small>
<small>Attorney signature</small>	<small>Petitioner signature</small>
<small>Attorney name (type or print)</small>	<small>Petitioner name (type or print)</small>
<small>Address</small>	<small>Address</small>
<small>City, state, zip</small>	<small>Telephone no.</small>
	<small>City, state, zip</small>
	<small>Telephone no.</small>

ORDER

- IT IS ORDERED:**
5. The petition is denied.
6. The petition is granted. The conservator is authorized to withdraw \$ _____ from the account stated in the petition. If access to these funds was restricted, access to the remainder of the funds is still restricted. Receipts or proof that the money was spent for the requested purpose shall be filed with this court by _____
Date
7. Other:

Date
- _____
Judge Bar no.

I certify that I have compared this copy with the original on file in this court and that it is a correct copy of the original.

Date _____
Deputy register

Instructions to Financial Institution: Do not accept any document other than a certified copy of this order with the court seal. Please retain this certified copy.

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line – For court use only

FILED _____ 20 _____

Deputy Register of Probate

SAMPLE

Approved, SCAO

JIS CODE: PAR/VFD

STATE OF MICHIGAN PROBATE COURT OAKLAND COUNTY CIRCUIT COURT – FAMILY DIVISION	PROOF OF RESTRICTED ACCOUNT AND ANNUAL VERIFICATION OF FUNDS ON DEPOSIT (CONSERVATORSHIP OF MINOR)	FILE NO.
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In the matter of _____, minor

USE NOTE: This form must be completed and filed with the court within 28 days of the conservator's qualification, or as otherwise ordered by the court, and annually thereafter.

Name of financial institution/insurance company/brokerage firm		
Address	Telephone no.	
Name of authorized representative	Title	

I certify that the estate funds of the minor are currently on deposit with us under a restricted account as follows:

Type of account	Account number	Balance
Account caption (include name of conservator)		

Attached is a copy of the corresponding financial institution's statement.*

I further certify that:

1. The funds, including accruals, shall not be released or withdrawn except by written order of this court.
2. Records have been marked to prohibit withdrawal except by written order of this court.
3. We are liable for funds released or withdrawn without written order of this court.

Date

Signature of authorized representative

* For annual verification, the corresponding financial institution's statement must be dated within 30 days after the end of the annual accounting period.

Do not write below this line – For court use only

FILED _____ **20** _____

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