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☐ CONSERVATORSHIP ☐ GUARDIANSHIP OF

(Name):

☐ Conservatee ☐ Minor

CASE NUMBER:

SUMMARY OF ACCOUNT—STANDARD AND SIMPLIFIED ACCOUNTS

☐ *(Check if final.)* **and Final Account** ☐ *(Check if interim.)* **Account Current**

Account number ("First," etc.)

Opening date of account **through** Closing date of account

CHARGES*

	Property on Hand at Beginning of Account Period, consisting of:		
1a	**Cash Assets**	$	
1b	**Non-Cash Assets** *(carry value)*		
1c	**Total Property on Hand at Beginning of Account Period** *(add 1a and 1b)*		$
2	**Additional Property Received During Period of Account — Schedule**		
3	**Receipts During Period of Account — Schedule A**		
4	**Gains on Sales During Period of Account — Schedule B**		
5	**Other Charges** *(describe):* **— Schedule**		
6	**Net Income From Trade or Business During Period of Account — Schedule**		
7	**TOTAL CHARGES** *(add 1c, 2, 3, 4, 5, and 6)*		$

CREDITS*

8	**Disbursements During Period of Account — Schedule C**		$
9	**Losses on Sales During Period of Account — Schedule D**		
10	**Distributions to Conservatee or Ward — Schedule**		
11	**Other Credits** *(describe):* **— Schedule**		
12	**Net Loss From Trade or Business During Period of Account — Schedule**		
	Property on Hand at End of Account Period — Schedule E, consisting of:		
13a	**Cash Assets**	$	
13b	**Non-Cash Assets** *(carry value)*		
13c	**Total Property on Hand at End of Account Period** *(add 13a and 13b)*		
14	**TOTAL CREDITS** *(add 8, 9, 10, 11, 12, and 13c)*		$

* *(Enter "0" for all categories of charges or credits for which you have no entries. Do not include schedules for these categories, but do not relabel or redesignate the schedules that are included.)*

Form Adopted for Mandatory Use
Judicial Council of California
GC-400(SUM)/GC-405(SUM)
[New January 1, 2008]

**SUMMARY OF ACCOUNT—
STANDARD AND SIMPLIFIED ACCOUNTS
(Probate—Guardianships and Conservatorships)**

Probate Code, §§ 1060–1064, 2620;
Cal. Rules of Court, rule 7.575
www.courtinfo.ca.gov

www.accesslaw.com

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