



Arizona Supreme Court Nos. R-22-0008, R-22-0019

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TO:

Rule 28 Distribution  
Hon Jay M Polk, Judge  
Aaron Nash

## ATTACHMENT<sup>1</sup>

### ARIZONA RULES OF PROBATE PROCEDURE

#### Rule 45. Conservator's Inventory, Budget, and Account

(a)–(b) [No change]

(c) Conservator's Inventory.

(1)–(2) [No change]

(3) *Required Attachments.*

(A) Bank and Securities Accounts. For each bank or securities account listed in the inventory, the conservator must attach to the inventory a complete copy of the statement that shows the balance of such account as of the date of the conservator's appointment.

(B) Real Property. For each parcel of real property listed in the inventory, the conservator must attach to the inventory document(s), such as an appraisal or a broker price opinion, showing the fair market value of the real property as of the date of the conservator's appointment.

(C) Tangible Personal Property. If the value of any tangible personal property listed in the inventory is based on an appraisal conducted by someone other than the conservator, the conservator must attach that appraisal to the inventory.

(4) Amendments. If, after filing the inventory but before filing the conservator's first account, the conservator discovers an additional asset or discovers that the value of an asset on the inventory, whether appraised or not, is erroneous or misleading, the conservator must file an amended inventory. If the conservator files an amended inventory because the conservator has discovered an additional asset and if the additional asset is not already subject to a court-ordered restriction, the conservator must, with the amended inventory, file a petition requesting the court to either increase the amount of the conservator's bond or enter an order restricting the sale, conveyance, or encumbrance of the additional asset.

(35) Consumer Credit Report. The conservator must file the consumer credit report required by A.R.S. § 14-5418(A) with the inventory.

(d) [No change]

(e) Conservator's Account.

(1) [No change]

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<sup>1</sup> Additions to the text of the rule are shown by underscoring and deletions of text are shown by ~~strike through~~.

(2) *Required Attachments.*

(A) Bank and Securities Account. For each bank or securities account listed on the ending balance schedule, the conservator must attach to the account a complete copy of the statement that ~~corresponds to~~ shows the ending balance of such account.

(B) Real Property. For any real property that was sold during the account period, the conservator must attach to the account the final HUD-1 or final HUD-1A settlement statement or similar final settlement statement for the sale.

(3)–(7) [No change]

(f)–(g) [No change]