

**IN THE PROBATE COURT OF MOBILE COUNTY, ALABAMA**

**IN THE MATTER OF**

\*

**THE ESTATE OF**

\*

**CASE NO.** \_\_\_\_\_

\*

\_\_\_\_\_,

**a protected person.**

\*

**PETITION FOR PARTIAL SETTLEMENT**

COMES NOW Petitioner, \_\_\_\_\_

("Petitioner"), as Conservator of the Estate of \_\_\_\_\_

, a protected person ("Ward"), and says as follows:

1. Petitioner is the duly appointed and acting conservator of the estate of the Ward.
2. Petitioner says that it is appropriate to make a partial settlement and accounting of the conservatorship for the period of his/her service, namely, \_\_\_\_\_, through \_\_\_\_\_. Petitioner attaches hereto as Exhibit "A" an accounting, showing all receipts and disbursements made by him/her as Conservator and said disbursements are supported by vouchers, and Petitioner's accounting is verified by his/her affidavit. Petitioner has used no part of the Ward's estate for his/her own personal use and benefit.
3. In recapitulation, Petitioner has received funds totaling \$\_\_\_\_\_ and has made disbursements totaling \$\_\_\_\_\_ leaving a balance on hand of \$\_\_\_\_\_ as of \_\_\_\_\_, \_\_\_\_\_, represented by checking account balance of \$\_\_\_\_\_ and certificates of deposit totaling \$\_\_\_\_\_. A bank certificate is attached hereto as Exhibit "B" showing the bank balance as of the date indicated, which may differ from Petitioner's reported balance because of interest earned or checks issued by Petitioner but not yet cleared at the bank. There

are no non-cash assets owned by the Ward, to the best of Petitioner's knowledge, information and belief, except as may be identified on the recapitulation page attached hereto as Exhibit "C".

4. Petitioner asks this Court to fix, ratify and award him/her commissions and compensation to which he/she is entitled by law, together with reimbursement of expenses, and including fees to which he/she is entitled for having provided legal services to this estate during the period of service. An invoice itemizing the total amounts requested as compensation is attached hereto as Exhibit "D."

WHEREFORE, Petitioner prays that upon the filing of this petition, the Court will appoint a day for the hearing hereof, will direct that notice be given as provided by law; that upon the hearing hereof, the Court will audit, pass and allow the account of Petitioner as conservator, that the Court will fix and allow to Petitioner compensation to which he/she is by law entitled as conservator, including commissions, fees and reimbursement of expenses; and will grant such other relief as shall be appropriate.

DATED: \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_  
Conservator of the Estate of \_\_\_\_\_  
\_\_\_\_\_, a minor

OF COUNSEL:

STATE OF ALABAMA:

COUNTY OF MOBILE:

Before me, the undersigned authority in and for said state and county, personally appeared

\_\_\_\_\_, who, known to me to be the  
Conservator of the Estate of \_\_\_\_\_, a minor, and  
having been first duly sworn, did depose and say that he/she signed the foregoing instrument and  
that he/she is informed and believes, and upon such information and belief avers, that the matters  
and facts contained therein are true and correct; further, that he/she is familiar with the statement  
of accounting attached hereto and that the matters and facts contained in said accounting are true  
and correct.

\_\_\_\_\_  
Sworn to and subscribed before me on this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_  
NOTARY PUBLIC

My Commission Expires: \_\_\_\_\_

\_\_\_\_\_  
(AFFIX NOTARIAL SEAL)

## RECAPITULATION

1. Real Property

A. Property having a street address of \_\_\_\_\_  
\_\_\_\_\_.

B. Property located in Township \_\_\_\_\_, Range \_\_\_\_\_, more particularly  
described as follows:

2. Personal Property - Cash

A. \_\_\_\_\_ Bank Checking Account  
Account No. \_\_\_\_\_ \$ \_\_\_\_\_

B. \_\_\_\_\_ Bank Savings Account  
Account No. \_\_\_\_\_ \$ \_\_\_\_\_

C. \_\_\_\_\_ Bank Certificate of Deposit  
CD No. \_\_\_\_\_ \$ \_\_\_\_\_

D. \_\_\_\_\_ Bank Certificate of Deposit  
CD No. \_\_\_\_\_ \$ \_\_\_\_\_

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