

Notice of Changes in Probate Court Effective April 1, 2016

Attorneys practicing before the Probate Court of Mobile County are hereby given notice of the following changes in various procedures effective **April 1, 2016**. Attorneys should note these changes and coordinate appropriate actions to comply with each with their clients. Should there be any questions, please do not hesitate to contact the Court. Don Davis, Judge of Probate

Appointed lawyers must be present at hearings:

1. For instanter or emergency actions
2. When testimony will be offered (check with attorney for petitioner)
3. To prove up a will or codicil
4. For guardianship/conservatorship merit hearings
5. When their client will be in Court

Written reports -Appointed Lawyers' written reports are due at least three days before the scheduled hearing. Please attach expedited handling cover sheet if filed later and before the hearing.

Inventories (decedents' estates and conservatorship estates) - The personal representative or conservator is required to attach to the inventory a copy of the bank documentation reflecting the establishment of estate bank account(s) and submit the same thereafter if there are additional accounts established.

Minimum bonds will increase to \$20,000 in all cases (estates and conservatorships).

Conservator bonds - Will now include Social Security and veterans' benefits, except in cases where a family member is serving as a conservator and the only asset is an SSI disability check where the family member is the payee of the same.

Conservators are required to notify the three national credit bureaus of the conservatorship case and confirm in writing with the inventory that such action has been taken.

Maintenance and support expenditures must be approved in advance by the Court in conservatorship cases; this restriction will be noted on Letters of Conservatorship.

Partial and final settlements - Conservators will be required to account for social security and veterans' benefits received except in cases where a family member is serving as a conservator and the only asset is a SSI disability check where the family member is the payee of the same. Conservators will also be required to furnish written verification of bank account balances from the banking institution to support the account balances.

Guardians - If a guardian is a payee of social security and/or veteran benefits for a relative- the guardian will be required to attach a copy of the most recent report submitted by the guardian to the Social Security Administration or Veterans' Administration with the annual guardian care plan.

Staff Changes - Effective April 1st, Sherrie Johnson will retire from the Court. Jenifer Hoffman will take her place as Deceased Estates' Team Leader and can be reached at 574-6010. LaToya Lee will take over as Involuntary Commitments Team Leader for Jenifer. LaToya can be reached at 574-6011.