



SHINGLE SPRINGS BAND OF MIWOK INDIANS TRIBAL COURT

P.O. Box 1340, Shingle Springs, CA 95682

Telephone: (530) 698 – 1446

Website: <https://www.shinglespringsrancheria.com/tribal-court/>

## **PUBLIC GUIDE INFORMATION SHEET**

### **TOPIC: Conservatorship of Estate/Per Capita/Elders Stipend Payments**

**How to Fill out a Conservators Report & Accounting, Form FL-525** Please read these instructions before filling out the form. If you have questions, please contact the Clerk of the Court or your Tribal Services Advocate. While Court staff cannot provide you with legal advice, staff may be able to provide you with referrals and resources to those who can assist you.

This form must be filled out and filed with the Tribal Court at least once per year. In addition, the form must be filled out and submitted to the Tribal Services Advocate quarterly – so every three months.

#### **Information of Person Filing Form**

Please provide your name, address, and phone number in the “*Information of Person Filing Form*” section. Enter your name as Conservator. Do not check the “Attorney” box if you are representing yourself and have no Attorney or Advocate representing you.

#### **Case No.:**

Fill in the case number. This number can be found on a copy of the Petition for Conservatorship.

#### **Name of Conservatee:**

Write the name of the person that you were appointed to help as the conservator.

#### **Question 1: Conservator Information**

- a. **Conservator(s) Name:** Write your full name and the name of any other people that were appointed by the Tribal Court as conservator(s).
- b. **Date appointed:** Write in the date that the Tribal Court appointed the conservator.
- c. **Contact Information:** If the conservator’s contact information has changed (address or phone or email) since the last time you were in Court for this case, check the box and write in the new contact information in the line provided.

#### **Question 2: Report coverage**

Write down the time period that you will be reporting. For example: From October 1, 2020 to December 31, 2020.

#### **Question 3: Conservator acknowledgments**

- a. **Type of conservator:** Put a check mark or X next to the box that describes the kind of conservatorship:
  - Check “The Estate” if the Court only appointed you to take care of a person’s financial affairs of the Per Capita Distribution or Elders Stipend.
  - Check “The Person” box if the Court only appointed you to take care of a person (but not their finances).



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- Check the “Both the Estate and the Person” box if the Court appointed you to take care of both the person and their Per Capita Distribution/Elders Stipend.
- b. Meeting: If you have already had a meeting (or set a meeting) with the Tribal Services Advocate about this conservatorship, check the first box. If you have not yet had a meeting (or set a meeting) with the Tribal Services Advocate about this conservatorship, check the second box.
- c. Duties. Check the first box if you believe you have done everything required of you in taking care of the person or Estate (finances) as Conservator for the time period you listed in question 2.

**Question 4: Conservator of the Person**

- a. Care and Protection: In your own words explain how you have kept the Conservatee safe and how you have cared for them. For example, “I checked in on the Conservatee every week” or “I called the Conservatee daily to make sure they were ok” or “I took the Conservatee to all of their doctor appointments.” If you have more to say but there is not enough room in the form, check the box that says, “Check here if additional pages are attached” and attached pages with your additional information.
- b. Living Arrangements. If the Conservatee now lives alone since the last time you were in Court, check the first box. If the Conservatee now lives with others since the last time you were in Court, check the second box and list the names of who the Conservatee is living with.
- c. Residence Type. Check the box that best describes the type of place where the Conservatee is living.
- d. New Arrangements. If anything has changed for the Conservatee, check the box(es) that apply to describe the change(s). Check as many boxes as apply.
- e. And if you checked any boxes in question (d) describe the changes in more detail in the lines provided. For example, if you checked Healthcare, describe what changed about that – did the Conservatee’s doctor change or did any medicine change? or if you check Meals, is the Conservatee getting meals/food at different times or did their diet change? If you need more space to write your explanation, continue writing on another page, attach that page to the Conservators Report, and check the box that says, “Check here if additional pages are attached.”

**Question 5: Conservator of the Estate.**

The “Estate” does not refer to houses and land. The Estate refers to Per Capita Distributions and Elders Stipends (a person’s finances).

*Note:* The ledgers (shown in blue and green) in this question are provided so that you have some space to list out the financial information. You must provide the financial information but you have an option to either use the ledgers or attach your own sheets which show the deposits and expenditures made.



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**Deposits- Blue Section:** You will need to list out the date of every Per Capita Distribution or Elders Stipend that you took care of during the period of time listed in question 2 of the form. These are known as the deposits; after you list all of the deposits, you will need to total them up and enter the amount on the line that says “Total Deposits”. You will also need to attach copies of the bank statements.

**Expenditures – Green Section:** You will need to list every item, service or expense where you spent down some of the Conservatee’s Per Capita Distributions or Elders Stipend in order to pay for something. This section can be long. It may be easier if you fill out a description each time out this part. Otherwise, if you wait until you need to file the document, you might have a lot of receipts to write down at one time.

Here is an example of what the entries might look like:

EXPENDITURES (You must also attach receipts)		
Date	Description	Amount
Jan 4, 2021	Phone payment	100. -
01/04/2021	Rent	1500.00
1-4-21	Food Groceries	1000.50

At the end of the list, you will need to add up all of the receipts and add that total on the form. If you need more space you can use *Attachment to Conservators Report and Accounting, Form FL-526*.

You will also need to attach copies of the receipts. This is important because the Court/Tribal Services will need to ensure that you have proof of the items that you listed in the ledger.

**➔TIP:** When attaching the receipts, please tape or staple receipts to sheets of paper (see attached examples). This is the best way that the information can be easily viewed. If you are unable to do this, please bring your receipts, nicely organized, to the Court Clerk. If the receipts are not taped or stapled to sheets of paper, it may delay the Court’s ability to file your documents. Not providing receipts might keep the Court from recognizing all of the hard work that you have done in caring for the Conservatee.

If you need to explain any of the ledger entries or receipts, please use the lines on page 4 of the form to write in an explanation.

**Signature**

Finally, the Conservator must write their name, sign, and date the form on the line provided.



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RECEIPT EXAMPLES.



SplitAbility™

Point of Sale 1300 Any POS



2015.07.31 10:28:12

ABC Restaurant

Table: 8

Mary Jane

Cappuccino	2 x 3.85
Flat White	4.75
*Still/Spark H2O	2 x 3.40
*Juice	3.45
*Orange	0.28

Sales	\$22.98
GST	\$1.13
GST-Free	\$10.53
Total:	\$22.98

Cash:	15.00
Card:	7.98
Change:	\$0.00

GROCERY DEPOT

5000 GA-5  
Douglasville, GA 30135

Cashier: ENZO G.

DELITE SKIM	\$10.36 TFA
4EA @ 2.59/EA	
WHOLEMILK	\$7.77 TFA
3EA @ 2.59/EA	
REDBULL	\$1.89 TFA
STRING CHEESE 16PK	\$7.98 TFA
2EA @ 3.99/EA	
SUBTOTAL	\$28.00
TAX	\$1.82
TOTAL	\$29.82
TEND	\$29.82
CHANGE DUE	\$0.00

Item Count 10

Thanks!!!

Date	Time	Lane	Clerk	Trans#
01/07/2019	09:45 AM	4	101	3854



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**If you have any questions about how to fill out this form, or about the conservatorship process in general, contact the Tribal Court Self Help Center.**

Shingle Springs Band of Miwok Indians  
Tribal Court

5281 Honpie Road

Placerville, CA

95667

(530) 698 – 1446

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Self Help Center

**Open 8-5, M-F**

**Attorney consultation by appointment only.**