

IN THE CHANCERY COURT OF SULLIVAN COUNTY  
AT  
(BLOUNTVILLE), (BRISTOL), (KINGSPORT), TENNESSEE

IN THE MATTER OF:

Civil Action # \_\_\_\_\_

\_\_\_\_\_  
(Ward/Minor)

\_\_\_\_\_ SETTLEMENT OF \_\_\_\_\_  
(Annual/Interim/Final) (Conservator/Guardian)

OF THE ESTATE OF \_\_\_\_\_, FOR THE  
TIME PERIOD OF \_\_\_\_\_, THE UNDERSIGNED  
FIDUCIARY WOULD RESPECTFULLY STATE THAT HE/SHE IS CHARGEABLE  
WITH THE FOLLOWING ASSETS BELONGING TO SAID ESTATE:

**ASSETS**

***Beginning Balance:***

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

***Income:***

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**TOTAL ASSETS:** \$ \_\_\_\_\_





**STATEMENT OF FIDUCIARY AS TO PHYSICAL OR MENTAL  
CONDITION OF THE DISABLED PERSON**

Comes now, \_\_\_\_\_, the duly appointed and  
qualified Conservator/Guardian of \_\_\_\_\_, and would  
(Ward/Minor)

respectfully show unto the Court the following:

That the ward/minor, \_\_\_\_\_, continues to need a  
Conservator/Guardian due to \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

(Specify the physical or mental condition of the disabled person)

That the ward/minor is presently residing at the following address: \_\_\_\_\_  
\_\_\_\_\_.

This statement is furnished to demonstrate to the Court the need, or lack of need, for the  
continuation of the fiduciary's services.

This \_\_\_\_\_ day of \_\_\_\_\_.

\_\_\_\_\_  
(Conservator/Guardian)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(City/State/Zip Code)

\_\_\_\_\_  
(Telephone No.)

**STATEMENT AS TO FILING OF UNITED STATES  
OR TENNESSEE INCOME TAX RETURN**

This Guardianship/Conservatorship is not required to file either a federal or state tax return for the period of this accounting because the taxable income for its most recent taxable year was within the exemption provided by Internal Revenue Code § 6012 and TCA § 67-2-104. The gross income for the last year was \$\_\_\_\_\_.

This \_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_.

\_\_\_\_\_  
Conservator/Guardian

**STATEMENT FROM CORPORATE SURETY**

TO THE CLERK & MASTER:

We, \_\_\_\_\_  
(Name of Corporate Surety)

pursuant to T.C.A. 34-11-111(D) hereby submit the following statement.

That we are surety on the bond of \_\_\_\_\_  
(Fiduciary)

as Conservator/Guardian for \_\_\_\_\_  
(Ward/Minor)

and that the bond is presently in the amount of \$\_\_\_\_\_.

We further state that said bond is in force for the next annual period, and will remain in effect until the Surety is discharged by Court order.

This \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_.

\_\_\_\_\_  
(Name of Corporate Surety)

By: \_\_\_\_\_  
(Attorney in Fact)

Agency Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Telephone No. \_\_\_\_\_