

Conservatorship Dos and Don'ts Person and Property

1. I understand the needs and preferences of the person with a disability are important and should be considered. I will treat him/her with respect. I will not physically, mentally, sexually or financially abuse or exploit him/her.

2. I will follow the Orders of the Court. I understand that if the authority is not specifically listed in the Order, I cannot make the decision on behalf of the person with a disability.

3. I WILL:

- a. Make decisions based upon the best interest of the person with a disability.
- b. Notify the Court if my address changes or if the person with a disability's address changes.
- c. Notify the Court if I believe the person with a disability no longer needs a conservator.
- d. File Reports on time unless waived by the Court; Inventory, Property Management Plan, Status Report, Annual/Final Accountings, tax returns, Corporate Surety Statement, and Social Security Statement of Account.
- e. Open a conservatorship bank account and deposit all of the person with a disability's income into the account.
- e. Keep good, accurate records. If an Accounting is required, I understand I must provide financial statements, (bank, investment, credit cards, etc.), copies of cancelled checks, invoices, receipts, tax returns, etc.

4. I WILL NOT:

- a. Limit communication and/or access to visitors unless specifically authorized by the Court.
- b. Spend the person with a disability's money/property on myself or pay myself without court approval.
- c. Spend the person with a disability's money/property on anyone else or pay anyone else without court approval.
- d. Make gifts on behalf of the person with a disability without court approval.
- e. Put my money (or anyone else's) in the conservatorship bank account.
- f. Borrow money from the person with a disability or loan money to others from the person with a disability's assets.
- g. Mortgage or sell the person with a disability's real property without court approval.
- h. Spend more than \$1,000 on a single expenditure without express permission granted in a Property Management Plan or other Court Order.
- i. Re-title assets of the person with a disability into my personal name.
- j. Pay Guardian ad litem fees, Attorney ad litem fees, Attorney fees or fees for professional tax preparation without specific court approval.

*Additional educational materials can be found at your local Court Clerk's Office,
<https://catenn.org/> and <https://officeofconservatorshipmanagement.nashville.gov/>*