

Inventories and Accounts for Minors & Disabled Persons
In Cook County, Illinois,
In 2022

APPENDIX

August 2, 2022

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NON-ATTORNEYS: You may have been referred to this presentation to learn more about Inventories or Accounts, or to assist you in gathering information. This presentation is NO substitute for an attorney. While I hope you find this information useful, DO NOT TRY THIS AT HOME (without a lawyer's guidance).

Cook County Rule 12.9: Inventories

(a) Each inventory shall list, as of the date of death of the decedent or the date of appointment of the guardian of the ward, as the case may be, the real and personal property which has come to the knowledge of the representative and any cause of action on which the representative has a right to sue. The inventory in a decedent's estate under supervised administration or in the estate of a minor or disabled person shall be verified and shall comply with the provisions of this rule.

(b) In addition to the requirements of Section 14-1 [755 ILCS 5/14-1], each inventory shall state the approximate total value of the personal estate (exclusive of those assets included in the inventory pursuant to paragraph (g) of this rule), the approximate annual income from the real estate in the possession of the representative, and that the bond of an individual representative complies with the provisions of Section 12-5 [755 ILCS 5/12-5].

(c) Consecutive item numbers, commencing with Arabic 1, shall be assigned to each item inventories and carried forward into the first account. Numbers so assigned shall be supplemented by additional consecutive item numbers for items added in subsequent inventories and accounts. A value need not be assigned to an inventoried item other than a bank account or similar property normally described in terms of an amount.

(d) To the extent feasible:

(i) Descriptions of real estate shall include the legal description and approximate size of each parcel, street address if any, the improvements thereon, and years for which taxes have not been paid. If any real estate is encumbered, the inventory shall include a description of the encumbrance and the principal balance owing at the date of death or at the date of appointment of the guardian, as the case may be. If a beneficial interest in real estate is an asset of the estate, the name and address of the trustee and other identifying information shall be stated. As to each parcel of real estate listed, the inventory shall state whether the representative is in possession, and, if not, the reason for not being in possession. (See Section 20-1)[755 ILCS 5/20-1].

(ii) Descriptions of stock shall include the number of shares, class of stock, exact corporate title and state of incorporation if necessary for the purpose of identification. Description of bonds shall include the total face value, name of obliger, kind of bond, rate of interest, date of maturity, interest dates, coupons attached or date to which interest is paid and endorsements. Descriptions of notes shall include the face amount and unpaid balance, date of note, date of maturity, name of maker, interest dates, rate of interest, date to which interest is paid, endorsements and, if secured, a description of the security. Descriptions of other securities (such as mutual funds, unit investment trusts, etc.) shall contain information consistent with the foregoing.

(iii) Descriptions of partnership interests shall include the partnership name and address and the interest of the estate.

(iv) If any tangible or intangible personal property is encumbered, the inventory shall include a description of the encumbrance and the principal balance owing at the date of death or at the date of appointment of the guardian, as the case may be.

(v) Descriptions of causes of action shall include the name of the person against whom the cause of action exists, its nature, and if suit has been instituted, the title, name of the court where pending and case number.

(e) Each inventory in a decedent's estate under supervised administration shall be filed with the clerk. Each inventory in the estate of a minor or disabled person shall be presented for approval to the judge to whom the case is assigned.

(f) An amended or supplemental inventory shall be filed if:

(i) Real or personal property has been erroneously described in a prior inventory;

(ii) Assets have been improperly included in or excluded from a prior inventory; or

(iii) Additional assets have come to the knowledge of the representative.

A supplemental inventory or an amendment to an inventory need not repeat assets correctly described in a prior inventory.

(g) In addition, each inventory of a guardian of the estate of a disabled person shall list separately any joint tenancy accounts and other assets in which the disabled person has an interest but which would not be subject to administration in a decedent's estate, and shall state the nature of the interest. The court may issue an order (1) freezing any or all assets so listed until further order of the court, and (2) requiring the guardian to give notice to all other persons who may have an interest in those assets.

(h) In a decedent's estate under supervised administration, authority to the representative to pay all or part of a distributive share before 6 months after issuance of letters will be granted only after filing of the inventory.

[Amended August 8, 1996, effective September 3, 1996.]

Cook County Rule 12.13: Accounts

Portions pertaining only to Decedents' Estates have been omitted.

(a) In each estate in which an account is filed in court:

(i) The account shall consist of the following five sections:

Receipts, Disbursements, Distributions, Recapitulation and Assets On Hand at the end of the period of the account.

(ii) Each asset listed in the account shall be designated by the number assigned to it as an asset on hand at the end of the accounting period of the preceding account or, if none, the number assigned to it in the inventory, or supplemental inventory in which it first appeared. Distribution of an item or conversion into cash or other disposition need be reported only in the first account after completion of the transaction. Each receipt attributable to an asset shall be reported under the asset in the Receipts section of the account. The total of all receipts reported shall be shown at the end of the Receipts section.

(iii) Each disbursement reported in the account shall be numbered and sufficiently identified, shall show the date, the name of recipient, the purpose and the amount of the disbursement and shall, in the estate of a ward, show the date of the court order authorizing the disbursement. All disbursements shall be reported in the following categories in the Disbursements section of the account: Administration Expenses, Taxes, Fees, Investment Purchases and Other Disbursements. The total of all disbursements reported shall be shown at the end of the Disbursements Section.

(iv) The account shall disclose the pendency of any litigation to which the estate is a party.

(v) In accounting for the income and disbursements with respect to an unincorporated business, real estate or beneficial interest in real estate in the possession of the representative, the representative shall report only total receipts and disbursements of the operation but shall retain all supporting vouchers.

(vi) The account shall include a numbered list of the assets on hand at the end of the period of the account and shall show the market value of each marketable security and the estimated value of each other income producing asset. If an asset listed is being assigned a number different from that used in the "Receipts" section, a cross reference to the latter number shall be included.

(vii) Notice of the hearing on an account, accompanied by a copy of the account, shall be given not less than 10 days before the hearing to each person entitled to a share of the estate who has not received his distributive share in full and to all other persons entitled to notice who has not waived notice and approved the account.

(viii) Each notice shall contain the time, place and nature of the hearing and substantially the following sentence: If the account is approved by the court upon hearing, in the absence of fraud, accident or mistake, the account as approved is binding upon all persons to whom this notice is given.

(b) In supervised administration of a decedent's estate...

(c) In either supervised or independent administration of a decedent's estate...

(d) In the estate of a ward:

(i) The guardian shall present an account of the guardian's administration within 30 days after the expiration of one year after the issuance of letter of office and, unless otherwise ordered, at least once in each year thereafter.

(ii) An account of a guardian or temporary guardian of a disabled person shall state the physical location and the physical and mental condition of the ward.

(iii) An account of a guardian of a minor shall state the physical location and the fact of attendance at school or occupation of the ward and, if the estate includes any interest in real estate in which the minor resides, shall be accompanied by a report regarding the guardian's inspection of that real estate.

(iv) In addition to the requirements of the Probate Act and unless waived by the person entitled thereto, notice of the hearing on an account under Section 24-11(b) [755 ILCS 5/24-11(b)] shall be given to each claimant whose claim is filed and remains undetermined or unpaid, and to other persons entitled to notice. If a person entitled to notice other than a ward is represented by an attorney whose appearance is on file, notice as required for motions shall be given to the attorney.

[Amended August 8, 1996, effective September 3, 1996.]

**IN THE CIRCUIT COURT OF COOK COUNTY, ILLINOIS
COUNTY DEPARTMENT, PROBATE DIVISION**

ESTATE OF:)	
)	
JANE SAMPLE,)	Court No. 20XX P XXXX
)	
A Person with a Disability.)	

INVENTORY

JOHN SAMPLE, Guardian of the Estate of JANE SAMPLE, states under penalties of perjury that the following is the Inventory of the real and personal property of the Estate and of any cause of action on which there is a right to sue that has come to the knowledge of the Guardian as of July 4, 2022.

<u>No.</u>	<u>Description</u>	<u>Value</u>
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REAL PROPERTY

- | | | |
|---|---|-----------|
| 1 | 123 Home Street, Unit 4A, Homewood, Illinois 60XXX
Lot X in the Green Subdivision, being a subdivision of the North XXX feet of the South XXX feet of the North ½ of the West ½ of the West ½ of the Northwest ¼ of Section XX, Township XX North, Range XX, East of the Third Principal Meridian, in Cook County, Illinois
PIN: XX-XX-XXX-XXX-XXXX
Estimated value of \$200,000.00 based on estimates from real property valuation website Zillow.com on X/XX/XX
This is the residence of the Disabled Person. | |
| 2 | 789 Vacant Place, Chicago, Illinois 60XXX
Lot XX In Block XX In Violet Highlands Addition To West Hammond (Now Calumet City) Being A Subdivision Of East XXX Feet Of South Half Of South West Quarter Of Section X, Township XX North, Range XX, East Of The Third Principal Meridian, In Cook County, Illinois
PIN: XX-XX-XXX-XXX-XXXX
Estimated value of \$13,000.00 based on estimates from real property valuation website Zillow.com on X/XX/XX | |
| 3 | 456 Renters Lane, Chicago, Illinois 60XXX
Lot X in the Blue Subdivision, being a subdivision of the South XXX feet of the East XXX feet of the South ½ of the West ½ of the West ½ of the Northwest ¼ of Section XX, Township XX North, Range XX, East of the Third Principal Meridian, in Cook County, Illinois
PIN: XX-XX-XXX-XXX-XXXX
Estimated value of \$500,000.00 based on estimates from real property valuation website Zillow.com on X/XX/XX
Subject to Mortgage Listed as Receipts, Item A
Total Potential Rent (\$1100/mo for 12 mo) | 13,200.00 |

PERSONAL PROPERTY

- | | | |
|---|---|------------|
| 4 | First Generic Bank, Account No. x1234
Premier Checking Account | 55,000.00 |
| 5 | First Generic Bank, Account No. x5678
IRA | 200,000.00 |

6	Second Generic Bank, Account No. x1234 Checking Account	3,894.31
7	Second Generic Bank, Account No. x5678 Savings Account Titled: Jane Sample and John Sample as Joint Tenants	20,000.00
8	Brokerage Firm of America, Account No. x1234 Brokerage Account	
8A	Cash at Inventory	1,000.00
8B	400 Shares, Generic Stock, Ticker: GNS Value at Inventory: \$52.92/share	21,168.00
8C	2000 Shares, Generic Ltd, Ticker: GNL Value at Inventory: \$6.00/share	12,000.00
9	Generic Life Insurance, Policy No. x5678 Cash Value Death Benefit: 10,000.00	6,000.00
10	Social Security Benefit: \$1,200.00 per month	
11	2014 Ford Escape Good condition Valuation on 7/25/22 from KBB.com	15,000.00
12	Tangible Personal Property	Assets On Hand

LIABILITIES

A	Generic Home Loans, Account No. x1234 30 Year Mortgage, Fixed Interest Rate: X.XXX% Attached to: 456 Renters Lane, Chicago, Illinois 60XXX (Item 3) Balance of Principal Liability as of 7/31/22 Balance of Escrow Account as of 7/31/22 Monthly Payment as of 7/31/22 Principal: 141.93, Interest: 497.57, Escrow: 278.78	34,115.23 2,118.47 918.28
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The approximate value of personal property on date of issuance of letters is:	334,062.31
The approximate annual income from real estate is:	13,200.00
The bond of the representative complies with the requirements of 755 ILCS 5/12-5.	

Attorney No. XXXXX
You Attorney, Esq.
Your Law Firm, P.C.
Attorneys for Guardian
Your Firm's Address
Your Firm's Address
(312) XXX-XXXX; you@yourlawfirm.com

JOHN SAMPLE, Guardian

Attorney Certification

**IN THE CIRCUIT COURT OF COOK COUNTY, ILLINOIS
COUNTY DEPARTMENT, PROBATE DIVISION**

ESTATE OF:

JANE SAMPLE,

A Person with a Disability.

)
)
)
)
)

Court No. 20XX P XXXX

FIRST CURRENT ACCOUNT OF THE GUARDIAN OF THE ESTATE
Covering from July 4, 2022 to July 31, 2023

JOHN SAMPLE, Guardian of the Estate of JANE SAMPLE, under penalties of perjury, respectfully submits to this Honorable Court the following statement of its receipts and disbursements for the period of July 4, 2022 to July 31, 2023.

SUMMARY

PERSONAL PROPERTY VALUE, AS REPORTED ON INVENTORY	\$334,062.31
INCOME FROM SOCIAL SECURITY	\$14,400.00
RECEIPTS FROM SALES	\$11,552.00
TAXES PAID	\$6,482.13
GUARDIAN'S FEES	\$0.00
ATTORNEY'S FEES	\$5,000.00
INVESTMENT PURCHASES	\$5,220.00
PERSONAL PROPERTY VALUE, AS OF FIRST ACCOUNT	\$295,086.08
ESTIMATED VALUE OF REAL ESTATE	\$700,000.00
ESTIMATED ANNUAL INCOME FROM REAL ESTATE	\$13,200.00

**IN THE CIRCUIT COURT OF COOK COUNTY, ILLINOIS
COUNTY DEPARTMENT, PROBATE DIVISION**

ESTATE OF:)	
)	
JANE SAMPLE,)	Court No. 20XX P XXXX
)	
A Person with a Disability.)	

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Covering from July 4, 2022 to July 31, 2023**

JOHN SAMPLE, Guardian of the Estate of JANE SAMPLE, under penalties of perjury, respectfully submits to this Honorable Court the following statement of its receipts and disbursements for the period of July 4, 2022 to July 31, 2023.

RECEIPTS

<u>No.</u>	<u>Description</u>	<u>Receipts</u>	<u>Changes in Value</u>	<u>Adjustments</u>
<u>REAL PROPERTY</u>				
1	123 Home Street, Unit 4A, Homewood, Illinois 60XXX Lot X in the Green Subdivision, being a subdivision of the North XXX feet of the South XXX feet of the North ½ of the West ½ of the West ½ of the Northwest ¼ of Section XX, Township XX North, Range XX, East of the Third Principal Meridian, in Cook County, Illinois PIN: XX-XX-XXX-XXX-XXXX Estimated value of \$200,000.00, Zillow.com X/XX/XX This is the residence of the Disabled Person.			
2	789 Vacant Lot, Chicago, Illinois 60XXX Lot XX In Block XX In Violet Highlands Addition To West Hammond (Now Calumet City) Being A Subdivision Of East XXX Feet Of South Half Of South West Quarter Of Section X, Township XX North, Range XX, East Of The Third Principal Meridian, In Cook County, Illinois PIN: XX-XX-XXX-XXX-XXXX Sold on X/XX/XX, P/C/O X/XX/XX Proceeds deposited into Item 6	11,000.00		
3	456 Renters Lane, Chicago, Illinois 60XXX Lot X in the Blue Subdivision, being a subdivision of the South XXX feet of the East XXX feet of the South ½ of the West ½ of the West ½ of the Northwest ¼ of Section XX, Township XX North, Range XX, East of the Third Principal Meridian, in Cook County, Illinois PIN: XX-XX-XXX-XXX-XXXX Estimated value of \$500,000.00, Zillow.com X/XX/XX Subject to Mortgage Listed as Receipts, Item A Total Potential Rent (\$1100/mo for 12 mo) 13,200.00 Rent Collected, Deposited in Item 14 4,400.00 Rent Collected, Deposited in Item 15 7,700.00	13,200.00 4,400.00 7,700.00		

PERSONAL PROPERTY

4	First Generic Bank, Account No. x1234 Premium Checking Account		
	Balance at Inventory	55,000.00	
	Interest	1.75	1.75
	7/22 - Transfer to Item 14	<u>(55,001.75)</u>	
	7/22 - Account Closed	0.00	
5	First Generic Bank, Account No. x5678 IRA		
	Balance at Inventory	200,000.00	
	Interest	1,050.00	1,050.00
	Disbursement	(50.00)	
	9/22 - Nontaxable Transfer to Item 13	<u>(201,000.00)</u>	
	9/22 - Account Closed	0.00	
6	Second Generic Bank, Account No. x1234 Checking Account		
	Balance at Inventory	3,894.31	
	7/22 - Transfer to Item 15	<u>(3,894.31)</u>	
	7/22 - Account Closed	0.00	
7	Second Generic Bank, Account No. x5678 Savings Account Titled: Jane Sample and John Sample as Joint Tenants		
	Balance at Inventory	20,000.00	
	Interest	17.50	17.50
	Balance at 1st Account	<u>20,017.50</u>	
8	Brokerage Firm of America, Account No. x1234 Brokerage Account 7/22 - All Assets Transferred to Item 16		
9	Generic Life Insurance, Policy No. x5678		
	Cash Value at Inventory	6,000.00	
	Change in Value	<u>400.00</u>	400.00
	Cash Value at 1st Account	6,400.00	
	Death Benefit: 10,000.00		
10	Social Security Benefit: \$1,200.00 per month		
	10 Payments of \$1200.00, Deposited in Item 14	12,000.00	
	2 Payments of \$1200.00, Deposited in Item 15	<u>2,400.00</u>	
		14,400.00	14,400.00
11	2014 Ford Escape Good condition Valuation on 7/25/22 from KBB.com	15,000.00	
12	Tangible Personal Property	Assets On Hand	
13	Second Acme Bank, Account No. x1234 IRA		
	Balance at Inventory	0.00	
	Transfer from Item 5	201,000.00	
	Interest	<u>15.00</u>	15.00
	Balance at 1st Account	201,015.00	

14	First Generic Bank, Account No. x0010 Premium Checking Account			
	Balance at Inventory	0.00		
	Transfer from Item 4	55,001.75		
	Interest	13.75	13.75	
	Deposits from Item 3	4,400.00		
	Deposits from Item 10	12,000.00		
	Transfers to Item 15	(10,000.00)		
	Disbursements	<u>(54,225.74)</u>		
	Balance at 1st Account	7,189.76		
15	Second Generic Bank, Account No. x0020 Checking Account			
	Balance at Inventory	0.00		
	Transfer from Item 6	3,894.31		
	Proceeds from Sale of Item 2	11,000.00		
	Deposits from Item 3	7,700.00		
	Deposits from Item 10	2,400.00		
	Transfers from Item 14	10,000.00		
	Disbursements	(28,416.48)		
	Adjustment	<u>(199.51)</u>		(199.51)
	Balance at 1st Account	6,378.32		
16	Brokerage Firm of America, Account No. x0030 Brokerage Account			
16A	Cash at Inventory	1,000.00		
	Interest	44.22	44.22	
	Dividends, 16B	109.23		
	Dividends, 16C	200.00		
	Dividends, 16D	139.05		
	Deposit from Sale of 16C	6,552.00		
	Disbursements	<u>(5,220.00)</u>		
	Cash at 1st Account	2,824.50		
16B	400 Shares, Generic Stock, Ticker: GNS			
	Dividends, Deposited in Item 16A		109.23	
	Value at Inventory: \$52.92/share	21,168.00		
	Unrealized Gain/Loss	<u>5,448.00</u>		5,448.00
	Value at First Account: \$66.54/share	26,616.00		
16C	2000 Shares, Generic Ltd, Ticker: GNL			
	Dividends, Deposited in Item 16A		200.00	
	Value at Inventory: \$6.00/share	12,000.00		
	<u>Sales</u>	<u>No. Sold</u>	<u>Proceeds</u>	
	10/2/2022	500.000	3,426.00	
	12/29/2022	500.000	3,126.00	
	Total	1000.000	6,552.00	
	Realized Gain/Loss on Shares Sold		552.00	
	Proceeds: \$6,552.00 to Receipts, Item 16A			
	Unrealized Gain/Loss on Remaining 1000 Shares			600.00
	Value at 1st Account: \$6.60/share	6,600.00		

16D	300 Shares, New Generic, Ticker: NGI			
	Value at Purchase on 2/18: \$17.40/share	5,220.00	5,220.00	
	Dividends, Deposited in Item 8A		139.05	
	Unrealized Gain/Loss	<u>(2,175.00)</u>		(2,175.00)
	Value at 1st Account: \$10.15/share	3,045.00		

17 Beneficial Interest in the Estate of Florian Sample, Deceased
 Approximate beneficial interest: \$40,000.00.
 Estate is pending in the Cook County Court under 22 P 9999.

TOTAL RECEIPTS	44,862.50		
TOTAL CHANGE IN VALUE		4,273.00	
TOTAL ADJUSTMENTS			(199.51)

LIABILITIES

A Generic Home Loans, Account No. XXXXXXXX
 30 Year Mortgage, Fixed Interest Rate: X.XXX%
 Attached to: 456 Renters Lane, Chicago, Illinois 60XXX (Item 3)
 Balance of Principal Liability as of 7/31/23 32,615.23
 Balance of Escrow Account as of 7/31/23 2,318.30
 Monthly Payment as of 7/31/23 918.28
 Principal: 149.93, Interest: 489.57, Escrow: 278.78

DISBURSEMENTS

ADMINISTRATION EXPENSES

DATE PAID	Voucher No.	PAYEE/DESCRIPTION	AMOUNT	TOTALS
<u>Caretaker (Budget: \$43,200/year, P/C/O 11/1/22)</u>				
8/1/2022	315	Generic Home Care	3,600.00	
9/1/2022	316	Generic Home Care	3,600.00	
10/1/2022	318	Generic Home Care	3,600.00	
11/1/2022	317	Generic Home Care	2,700.00	
12/1/2022	340	Acme Home Care	900.00	
12/15/2022	400	Acme Home Care	3,600.00	
1/15/2023	341	Acme Home Care	3,600.00	
2/15/2023	344	Acme Home Care	3,600.00	
3/15/2023	345	Acme Home Care	3,600.00	
4/15/2023	347	Acme Home Care	3,600.00	
5/15/2023	348	Acme Home Care	3,600.00	
6/15/2023	355	Acme Home Care (raised rate by \$50/week)	3,800.00	
7/15/2023	356	Acme Home Care	3,800.00	
TOTAL, Paid from Item 14:			43,600.00	
<u>Home Expenses (Budget: \$7,400/year, P/C/O 11/1/22)</u>				
7/10/2022	343	Acme Management, General Assessment	225.00	
8/1/2022	321	Acme Phone Service	127.51	
8/1/2022		Acme Electric	158.55	
8/1/2022		Acme Gas	103.31	
9/1/2022	349	Acme Phone Service	124.14	
9/1/2022		Acme Electric	285.39	
9/1/2022		Acme Gas	103.31	
10/1/2022	397	Acme Phone Service	117.31	
10/1/2022		Acme Electric	251.31	
10/1/2022		Acme Gas	103.32	
11/1/2022	417	Acme Phone Service	245.03	
11/1/2022	415	Acme Insurance (Homeowners Insurance)	345.00	
11/1/2022		Acme Electric	172.42	
11/1/2022		Acme Gas	103.32	
12/10/2022		Acme Gas	103.32	
TOTAL, Paid from Item 14:			2,568.24	
MONTHLY		Acme Management Group, General Assessment, 5 months @ \$225.00	1,125.00	
MONTHLY		Acme Management Group, General Assessment, 7 months @ \$250.00	1,750.00	
12/4/2022	11233	Acme Management Group (Special Assessment, Sump Pump)	260.00	
12/15/2022	11234	Acme Electric	105.66	
12/15/2022	11235	Acme Gas	101.83	
12/15/2022	11236	Acme Phone Service	125.18	
1/15/2023	11238	Acme Electric	78.69	
1/15/2023	11239	Acme Gas	103.32	
1/15/2023	11241	Acme Phone Service	125.18	
2/15/2023	11242	Acme Electric	105.66	
2/15/2023	11243	Acme Gas	101.83	

2/15/2023	11245	Acme Phone Service	125.18
3/15/2023	11246	Acme Electric	117.11
3/15/2023	11247	Acme Gas	101.83
3/15/2023	11248	Acme Phone Service	125.18
4/15/2023	11250	Acme Electric	107.19
4/15/2023	11252	Acme Phone Service	125.18
5/15/2023	11253	Acme Electric	80.25
5/15/2023	11255	Acme Gas	203.66
5/15/2023	11256	Acme Phone Service	125.18
6/15/2023	11258	Acme Electric	173.67
6/15/2023	11259	Acme Gas	101.83
6/15/2023	11260	Acme Phone Service	125.18
7/15/2023	11261	Acme Electric	96.35
7/15/2023	11262	Acme Gas	101.83
7/15/2023	11263	Acme Phone Service	125.18
TOTAL, Paid from Item 15			5,817.15

TOTAL: 8,385.39

Groceries (Budget: \$4,800/year, P/C/O 11/1/22)

8/1/2022	11221	Jewel-Osco	506.00
9/1/2022	11222	Jewel-Osco	312.00
10/1/2022	11223	Jewel-Osco	445.00
11/1/2022	11224	Jewel-Osco	506.00
12/1/2022	11225	Jewel-Osco	312.00
1/15/2023	11237	Jewel-Osco	445.00
2/15/2023	11240	Jewel-Osco	506.00
3/15/2023	11244	Jewel-Osco	312.00
4/15/2023	11249	Jewel-Osco	445.00
5/15/2023	11254	Jewel-Osco	506.00
6/15/2023	11257	Jewel-Osco	312.00
7/15/2023	11266	Jewel-Osco	445.00
TOTAL, Paid from Item 15:			5,052.00

Supplemental Health Insurance (\$205/month, P/C/O 11/1/22)

MONTHLY	Acme Insurance, \$205/month @ 6 months (Direct Debit)	1,230.00
MONTHLY	Acme Insurance, \$210/month @ 7 months (Direct Debit)	1,470.00
TOTAL, Paid from Item 15:		2,700.00

Allowance (\$100/month, P/C/O 11/1/22)

MONTHLY	Jane Sample, \$100/month @ 13 months	1,300.00
TOTAL, Paid from Item 15:		1,300.00

Recreational Activities (Budget: \$3,500.00/year, P/C/O 11/1/22)

8/1/2022	320	Acme Council for Elderly Activities	600.00
12/1/2022	361	Acme Council for Elderly Activities	800.00
4/1/2023	379	Acme Council for Elderly Activities	200.00
6/1/2023	398	Acme Council for Elderly Activities	700.00
TOTAL, Paid from Item 14:			2,300.00

10/1/2022	11018	Acme Council for Elderly Activities	1,000.00
2/10/2023	11277	Acme Council for Elderly Activities	450.00
TOTAL, Paid from Item 15:			1,450.00

TOTAL: 3,750.00

Miscellaneous/Discretionary Fund (Budget: \$100/month, P/C/O 11/1/22)

8/1/2022	11011	Acme Services (Handyman repairs)	428.82	
9/1/2022	11012	City of Acme (Pet Registration)	18.00	
11/1/2022	11014	Fashions by Acme (item requested by Ward)	149.66	
12/1/2022	11015	Acme Duct Cleaning	1,061.28	
1/15/2023	11016	Acme Buy (item requested by Ward)	108.33	
3/15/2023	11018	Acme & Co (Tax Return Preparation)	57.61	
6/15/2023	11021	Acme Theatre	20.00	
TOTAL, Paid from Item 15:				1,843.70

Medical

8/1/2022	383	Julie Acme (Dentist)	120.00	
12/1/2022	401	Acme Health Care (Heart Doctor)	40.00	
2/1/2023	395	Julie Acme (Dentist)	120.00	
4/1/2023	421	Acme Health Care (Heart Doctor)	40.00	
6/1/2023	432	Acme Health Care (Heart Doctor)	40.00	
TOTAL, Paid from Item 14:				360.00

Prescriptions

8/1/2022	334	Acme Medco	146.00	
12/1/2022	336	Acme Medco	27.00	
2/1/2023	339	Acme Medco	300.00	
4/1/2023	340	Acme Medco	180.00	
6/1/2023	377	Acme Medco	268.00	
TOTAL, Paid from Item 14:				921.00

TAXES

Income Taxes

3/15/2023	352	Illinois Department of Revenue	410.00	
3/15/2023	353	U.S. Treasury	2,300.00	
TOTAL, Paid from Item 14:				2,710.00

Real Estate Taxes

2/25/2022	363	Cook County Treasurer (For Renters Lane property)	1,646.14	
2/25/2022	364	Cook County Treasurer (For Home Street property)	120.36	
TOTAL, Paid from Item 14:			1,766.50	
12/1/2022	11005	Cook County Treasurer (For Renters Lane property)	1,874.12	
12/1/2022	11006	Cook County Treasurer (For Home Street property)	131.51	
TOTAL, Paid from Item 15:			2,005.63	
TOTAL:				3,772.13

FEES

8/1/2022		First Generic Bank, Annual Account Fee	50.00	
TOTAL, Paid from Item 5:				50.00

Bondsman

8/7/2022		Acme & Sons Bonding Company	3,248.00	
TOTAL, Paid from Item 15:				3,248.00

Guardian's Fees

NONE

Attorney's Fees

12/17/2022	11007	YOUR LAW FIRM, P.C., P/C/O 11/1/22	4,000.00	
12/17/2022	11008	APPOINTED LAW FIRM, P.C. (GAL), P/C/O 11/1/22	<u>1,000.00</u>	
TOTAL, Paid from Item 15:				5,000.00

INVESTMENT PURCHASES

2/6/2023		300 Shares, New Generic, Ticker: NGI Value at Purchase on 2/23: \$17.40/share <i>See Item 16D</i>	<u>5,220.00</u>	
TOTAL, Paid from Item 16:				5,220.00

TOTAL DISBURSEMENTS 87,912.22

RECAPITULATION

Cash on Hand at Inventory	334,062.31
Plus Receipts	44,862.50
Plus Changes in Value	4,273.00
Less Adjustments Reported With Receipts	(199.51)
Less Disbursements	(87,912.22)
Cash on Hand at 1st Current Account	295,086.08

ASSETS ON HAND AT 1ST CURRENT ACCOUNT

1	123 Home Street, Unit 4A, Homewood, Illinois 60XXX Lot X in the Green Subdivision, being a subdivision of the North XXX feet of the South XXX feet of the North ½ of the West ½ of the West ½ of the Northwest ¼ of Section XX, Township XX North, Range XX, East of the Third Principal Meridian, in Cook County, Illinois PIN: XX-XX-XXX-XXX-XXXX Estimated value of \$200,000.00 based on estimates from real property valuation website Zillow.com on X/XX/XX This is the residence of the Disabled Person.	
3	456 Renters Lane, Chicago, Illinois 60XXX Lot X in the Blue Subdivision, being a subdivision of the South XXX feet of the East XXX feet of the South ½ of the West ½ of the West ½ of the Northwest ¼ of Section XX, Township XX North, Range XX, East of the Third Principal Meridian, in Cook County, Illinois PIN: XX-XX-XXX-XXX-XXXX Estimated value of \$500,000.00 based on estimates from real property valuation website Zillow.com on X/XX/XX Subject to Mortgage Listed as Receipts, Item A Total Potential Rent (\$1100/mo for 12 mo): 13,200.00	
7	Second Generic Bank, Account No. x5678 Savings Account Titled: Jane Sample and John Sample as Joint Tenants Balance at 1st Account	20,017.50
9	Generic Life Insurance, Policy No. x5678 Cash Value at 1st Account Death Benefit: 10,000.00	6,400.00
10	Social Security Benefit: \$1,200.00 per month	
11	2014 Ford Escape Good condition Valuation on 7/25/22 from KBB.com	15,000.00
12	Tangible Personal Property	Assets On Hand
13	Second Acme Bank, Account No. XXX-XXXX IRA Balance at 1st Account	201,015.00

14	First Generic Bank, Account No. x0010 Premium Checking Account	7,189.76
15	Second Generic Bank, Account No. x0020 Checking Account	6,378.32
16	Brokerage Firm of America, Account No. x0030 Brokerage Account	
16A	Cash at 1st Account	2,824.50
16B	400 Shares, Generic Stock, Ticker: GNS	26,616.00
16C	2000 Shares, Generic Ltd, Ticker: GNL	6,600.00
16D	300 Shares, New Generic, Ticker: NGI	3,045.00
17	Beneficial Interest in the Estate of Florian Sample, Deceased Approximate beneficial interest: \$40,000.00. Estate is pending in the Cook County Court under 22 P 9999.	

Assets on Hand at 1st Current Account

295,086.08

LIABILITIES

A	Generic Home Loans, Account No. XXXXXXXX 30 Year Mortgage, Fixed Interest Rate: X.XXX% Attached to: 456 Renters Lane, Chicago, Illinois 60XXX (Receipts, Item 2) Balance of Principal Liability as of 7/31/18 Balance of Escrow Account as of 7/31/18 Monthly Payment as of 7/31/18 Principal: 149.93, Interest: 489.57, Escrow: 278.78	32,615.23 2,318.30 918.28
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SURETY BOND

This Court entered an initial Surety Bond of \$350,000.00 on July 4, 2022. An additional Surety Bond of \$134,030.00 shall be presented to the Court with this Account so as to provide total coverage of \$484,030.00 (i.e., 150% of all assets on hand of \$295,086.08 + the annual anticipated rental income of \$13,200.00 + the annual anticipated social security income of \$14,400.00).

CERTIFICATION

WHEREAS, the Petitioner, JOHN SAMPLE, Guardian of the Estate of JANE SAMPLE, being duly sworn, deposes and says that he has read this FIRST CURRENT ACCOUNT by him so subscribed, that he knows the contents thereof, and that the same is true to the best of his knowledge and belief.

By _____
JOHN SAMPLE

Attorney Certification

Attorney No. XXXXX
You Attorney, Esq.
Your Law Firm, P.C.
Attorneys for Guardian
Your Firm's Address
Your Firm's Address
(312) XXX-XXXX; you@yourlawfirm.com

IN THE CIRCUIT COURT OF COOK COUNTY, ILLINOIS
COUNTY DEPARTMENT, PROBATE DIVISION

File No. _____

Estate of _____

A Person with a Disability

GUARDIAN'S ANNUAL REPORT REGARDING WARD

Pursuant to §11a-17(b) of the Probate Act of 1975 [755 ILCS 5/11a-17(b)], _____,
[printed name of the Guardian]

having been appointed on _____ as guardian of the person of
[date of appointment]

_____ (the "Ward"), submits this annual Report
[printed name of the a person with a disability]

as follows (if the Ward is deceased, attach a copy of the death certificate and do not complete the numbered paragraphs of this Report):

- 1. The Ward is now _____ years of age.
The Ward's current mental diagnosis: _____
The Ward's current physical diagnosis: _____
The Ward's current mental condition: _____
The Ward's current physical condition: _____
The Ward's current social condition: _____

- 2. The Ward's current living arrangements, including the place of residence, and the Guardian's opinion as to the appropriateness of those arrangements: _____

The Ward's other places of residence since the last report and the length of stay at each place:

Address of Other Place of Residence

Length of Stay

Address of Other Place of Residence	Length of Stay
_____	_____
_____	_____
_____	_____

- 3. Medical and dental services provided to the Ward: _____

Educational service provided to the Ward: _____

Vocational and other professional services provided to the Ward: _____

4. A summary of the Guardian’s visits with and activities on behalf of the Ward:

Dates	Description
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

5. The Guardian recommends that there _____ a need for continued guardianship because _____
(is) (is not)

6. Other information concerning the Ward which may in the opinion of the Guardian be useful to the Court:

Dated _____

[signature of the Guardian]

[printed name of the Guardian]

[address of the Guardian]

[city/state/zip code]

[telephone of Guardian]

Mail To:

The Judge assigned to Calendar _____
Circuit Court of Cook County, Probate Division
Richard J. Daley Center, 18th Floor
50 West Washington Street
Chicago, Illinois 60602

Service via email from opposing party/counsel will be accepted at:

by consent pursuant to Ill. Sup. Ct. Rules 11 and 131.

**IN THE CIRCUIT COURT OF COOK COUNTY, ILLINOIS
COUNTY DEPARTMENT, PROBATE DIVISION**

Estate of)	
)	
)	
JANE SAMPLE,)	Court No. 20XX P XXXX
)	
A Person with a Disability)	
)	

PETITION TO REDUCE BOND

NOW COMES JOHN SAMPLE, Plenary Guardian of the Estate (“Guardian”) of JANE SAMPLE (the “Disabled Person”), by and through his attorneys YOUR LAW FIRM, P.C., under penalties of perjury respectfully presents his *Petition to Reduce Bond*, and in support thereof, states as follows:

1. Guardian was appointed on July 4, 2022 and continues to act in that capacity. Upon appointment, this Court approved a surety bond in the sum of \$562,500.00. *See Exhibit “A.”*
2. The Inventory filed concurrently with this Petition shows assets on hand of \$334,062.31 of personal property as of the date of Guardian’s appointment.
3. The bond should be reduced to \$501,094.00 (i.e., 150% of \$334,062.31).

WHEREFORE, JOHN SAMPLE, Plenary Guardian of the Estate of JANE SAMPLE prays that the surety bond filed in this matter be reduced to \$501,094.00 *nunc pro tunc* to the date of the Guardian’s appointment and for such further and other relief that this Court deems just and equitable.

Attorney No. XXXXX
You Attorney, Esq.
Your Law Firm, P.C.
Attorneys for Guardian
Your Firm's Address
Your Firm's Address
(312) XXX-XXXX
you@yourlawfirm.com

Respectfully submitted,
JOHN SAMPLE

By: _____
One of his Attorneys

**IN THE CIRCUIT COURT OF COOK COUNTY, ILLINOIS
COUNTY DEPARTMENT, PROBATE DIVISION**

Estate of)
)
)
 JANE SAMPLE,) Court No. 20XX P XXXX
)
 A Person with a Disability)
)

PETITION FOR APPROVAL OF ANNUAL BUDGET AND CARE PLAN

NOW COMES JOHN SAMPLE (hereinafter, “Guardian”), Plenary Guardian of the Estate and Person of JANE SAMPLE, a disabled person (hereinafter, “Disabled Person”), by and through his attorneys, YOUR LAW FIRM, P.C., and in support of his *Petition for Approval of Annual Budget and Care Plan* states as follows:

1. Guardian was appointed as Plenary Guardian of the Estate and Person on July 4, 2022, and continues to act in those capacities.
2. Guardian’s *Inventory*, filed contemporaneously with this Petition, shows that, on the date of appointment, the value of all personal property owned by the Estate was \$334,062.31, and the value of all real property was estimated at \$713,000.00.
3. The proposed monthly expenses of the Disabled Person are itemized on the attached *Exhibit “A,”* and total \$5,313.34 per month.
4. The Disabled Person receives \$1,200.00 per month in social security benefits, and \$1,100.00 per month in rent. The Guardian is placing the assets of the Estate into conservative investments which shall realize approximately 2-3% growth per year, totaling approximately \$777.21 per month.
5. Applying the amount of all proposed allowable monthly expenses to the entirety of the Disabled Person’s anticipated monthly income results in a deficit of approximately \$2,236.13 per month.
6. While this deficit is substantial, the Guardian believes that it is in the Disabled Person’s best interests to stay at her home, 123 Home Street, Unit 4A, Homewood, Illinois.
7. The Disabled Person is 82 years old and has resided at her home for the past 24 years. For the last 6 years, the Guardian (her son) has resided with her to tend to some of her needs. He intends to continue to do so. While the Guardian works during the day, the Disabled Person’s mild dementia requires a caretaker to assist her with activities of daily living, drive her to personal and medical appointments and to keep her company. It is in the Disabled Person’s best interest to retain this arrangement in order to

maximize her independence, as long as the Disabled Person retains a meaningful degree of capacity.

8. The Guardian also believes that it is in the best interests of the Disabled Person to approve a budget to prevent the need to ask the Court's approval for routine and expected expenses as they occur.

WHEREFORE, JOHN SAMPLE, Plenary Guardian of the Estate and Person of JANE SAMPLE, a disabled person, respectfully requests that this Court enter an Order which:

- A. approves the budget as set forth in *Exhibit "A"* to this Petition,
- B. ratifies the permanent placement of JANE SAMPLE at 123 Home Street, Unit 4A, Homewood, Illinois, and
- C. grants such other relief as the Court deems appropriate.

Attorney No. XXXXX
You Attorney, Esq.
Your Law Firm, P.C.
Attorneys for Guardian
Your Firm's Address
Your Firm's Address
(312) XXX-XXXX
you@yourlawfirm.com

Respectfully submitted,
JOHN SAMPLE

By: _____
One of his Attorneys

VERIFICATION

Under penalties as provided by law pursuant to Section 1-109 of the Illinois Code of Civil Procedure, the undersigned states that he has read the foregoing *Petition for Approval of Annual Budget and Care Plan* and certifies that the statements set forth in the foregoing instrument are true and correct, except as to matters therein stated to be on information and belief and as to such matters the undersigned certifies as aforesaid that he verily believes the same to be true.

JOHN SAMPLE

**Estate of Jane Sample, disabled
Court No. 20XX P XXXX**

Exhibit "A" - Annual Budget

<u>Expense</u>	<u>Monthly Allowance</u>
Caretaker (\$43,000/year)	\$3,600.00
Home Expenses (including general assessment of \$225 per month and utilities, \$7,400/year)	\$616.67
Groceries (\$4,800/year)	\$400.00
Supplemental Health Insurance (Acme Insurance, \$2,460/year)	\$205.00
Allowance (\$1,200/year)	\$100.00
Recreational Activities (\$3,500/year)	\$291.67
Discretionary Fund for other Personal Items for the Disabled Person (\$1,200/year)	\$100.00
Total	\$5,313.34