Inventories and Accounts for Minors & Disabled Persons In Cook County, Illinois, In 2025

APPENDIX

September 17, 2025

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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 who 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, 2025.

No.	Description	Value
	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 7/25/25 from KBB.com		15,000.00
12		Tangible Personal Property		Assets On Hand
13		Beneficial Interest in the Estate of Florian Sample, Deceased Approximate beneficial interest: $40,000.00. Estate is pending in the Cook County Court under 25 P 9999.		
14		Cause of Action, Jane Sample v. Acme Trucking, Inc. et al. Personal injury lawsuit for damages sustained prior to Guardianship due to auto collision. Lawsuit was recently filed, and is pending in the Cook County Court under 25 L 999.		

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 7/31/25	34,115.23	
		Balance of Escrow Account as of 7/31/25	2,118.47	
		Monthly Payment as of 7/31/25 Principal: 141.93, Interest: 497.57, Escrow: 278.78	918.28	

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,	)	**Court No. 20XX P XXXX**
	)	
A Person with a Disability.	)	

FIRST CURRENT ACCOUNT OF THE GUARDIAN OF THE ESTATE
Covering from July 4, 2025 to July 31, 2026

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, 2025 to July 31, 2026.

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.	)	

FIRST CURRENT ACCOUNT OF THE GUARDIAN OF THE ESTATE
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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, 2025 to July 31, 2026.

RECEIPTS

No.	Description		Receipts	Changes in Value	Adjustments
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, 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		

PERSONAL PROPERTY

4	First Generic Bank, Account No. x1234			
	Premium Checking Account			
	Balance at Inventory	55,000.00		
	Interest	1.75	1.75	
	7/25 - Transfer to Item 16	(55,001.75)		
	7/25 - 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)		
	9/25 - Nontaxable Transfer to Item 15	(201,000.00)		
	9/25 - Account Closed	0.00		
6	Second Generic Bank, Account No. x1234			
	Checking Account			
	Balance at Inventory	3,894.31		
	7/25 - Transfer to Item 17	(3,894.31)		
	7/25 - 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	20,017.50		
8	Brokerage Firm of America, Account No. x1234			
	Brokerage Account			
	7/25 - All Assets Transferred to Item 18			
9	Generic Life Insurance, Policy No. x5678			
	Cash Value at Inventory	6,000.00		
	Change in Value	400.00		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	2,400.00		
		14,400.00	14,400.00	
11	2014 Ford Escape			
	Good condition			
	Valuation on 7/25/25 from KBB.com	15,000.00		
12	Tangible Personal Property	Assets On Hand		
13	Beneficial Interest in the Estate of Florian Sample, Deceased			
	Approximate beneficial interest: $40,000.00.			
	Estate is pending in the Cook County Court under 25 P 9999.			
14	Cause of Action, Jane Sample v. Acme Trucking, Inc. et al.			
	Personal injury lawsuit for damages sustained prior to Guardianship due to auto collision.			

Lawsuit is pending in the Cook County Court under 25 L 999 and is presently litigating a Motion to Dismiss.

15	Second Acme Bank, Account No. x1234			
	IRA			
	Balance at Inventory	0.00		
	Transfer from Item 5	201,000.00		
	Interest	15.00	15.00	
	Balance at 1st Account	201,015.00		
16	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	(54,225.74)		
	Balance at 1st Account	7,189.76		
17	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	(199.51)		(199.51)
	Balance at 1st Account	6,378.32		

INSTRUCTIONAL NOTE: *Below, this sample document includes two approaches to brokerage accounts as to sample Item 18. While I have traditionally used the longer approach, I have the impression that Judges will likely accept the shorter approach.*

Shorter Approach (An artificial deduction of the duplicative $7,092.50 is made from totaled Receipts, below.)

18	Brokerage Firm of America, Account No. x0030			
	Brokerage Account			
	Value of All Assets at Inventory	34,168.00		
	Change in Value and Income	7,092.50	7,092.50	
	Disbursements	(5,220.00)		
	Value of All Assets at First Account	36,040.50		

Traditional Approach

18	Brokerage Firm of America, Account No. x0030			
	Brokerage Account			
18A	Cash at Inventory	1,000.00		
	Interest	44.22	44.22	
	Dividends, 18B	109.23		
	Dividends, 18C	200.00		
	Dividends, 18D	139.05		
	Deposit from Sale of 18C	6,552.00		
	Disbursements	(5,220.00)		

	Cash at 1st Account		2,824.50		
18B	400 Shares, Generic Stock, Ticker: GNS				
	Dividends, Deposited in Item 18A			109.23	
	Value at Inventory: $52.92/share		21,168.00		
	Unrealized Gain/Loss		5,448.00		5,448.00
	Value at First Account: $66.54/share		26,616.00		
18C	2000 Shares, Generic Ltd, Ticker: GNL				
	Dividends, Deposited in Item 18A			200.00	
	Value at Inventory: $6.00/share		12,000.00		

Sales	No. Sold	Proceeds
10/2/2025	500.000	3,426.00
12/29/2025	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		
18D	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 18A		139.05	
	Unrealized Gain/Loss	(2,175.00)		(2,175.00)
	Value at 1st Account: $10.15/share	3,045.00		
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 7/31/26	32,615.23
	Balance of Escrow Account as of 7/31/26	2,318.30
	Monthly Payment as of 7/31/26	918.28
	Principal: 149.93, Interest: 489.57, Escrow: 278.78	

DISBURSEMENTS

ADMINISTRATION EXPENSES

DATE PAID	Voucher No.	PAYEE/DESCRIPTION	AMOUNT	TOTALS
Caretaker (Budget: $43,200/year, P/C/O 11/1/25)				
8/1/2025	315	Generic Home Care	3,600.00	
9/1/2025	316	Generic Home Care	3,600.00	
10/1/2025	318	Generic Home Care	3,600.00	
11/1/2025	317	Generic Home Care	2,700.00	
12/1/2025	340	Acme Home Care	900.00	
12/15/2025	400	Acme Home Care	3,600.00	
1/15/2026	341	Acme Home Care	3,600.00	
2/15/2026	344	Acme Home Care	3,600.00	
3/15/2026	345	Acme Home Care	3,600.00	
4/15/2026	347	Acme Home Care	3,600.00	
5/15/2026	348	Acme Home Care	3,600.00	
6/15/2026	355	Acme Home Care (raised rate by $50/week)	3,800.00	
7/15/2026	356	Acme Home Care	3,800.00	
	TOTAL, Paid from Item 16:			**43,600.00**
Home Expenses (Budget: $7,400/year, P/C/O 11/1/25)				
7/10/2025	343	Acme Management, General Assessment	225.00	
8/1/2025	321	Acme Phone Service	127.51	
8/1/2025		Acme Electric	158.55	
8/1/2025		Acme Gas	103.31	
9/1/2025	349	Acme Phone Service	124.14	
9/1/2025		Acme Electric	285.39	
9/1/2025		Acme Gas	103.31	
10/1/2025	397	Acme Phone Service	117.31	
10/1/2025		Acme Electric	251.31	
10/1/2025		Acme Gas	103.32	
11/1/2025	417	Acme Phone Service	245.03	
11/1/2025	415	Acme Insurance (Homeowners Insurance)	345.00	
11/1/2025		Acme Electric	172.42	
11/1/2025		Acme Gas	103.32	
12/10/2025		Acme Gas	103.32	
	TOTAL, Paid from Item 16:		**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	
12/4/2025	11233	Acme Management Group (Special Assessment, Sump Pump)	260.00	
12/15/2025	11234	Acme Electric	105.66	
12/15/2025	11235	Acme Gas	101.83	
12/15/2025	11236	Acme Phone Service	125.18	
1/15/2026	11238	Acme Electric	78.69	
1/15/2026	11239	Acme Gas	103.32	
1/15/2026	11241	Acme Phone Service	125.18	
2/15/2026	11242	Acme Electric	105.66	
2/15/2026	11243	Acme Gas	101.83	

2/15/2026	11245	Acme Phone Service	125.18	
3/15/2026	11246	Acme Electric	117.11	
3/15/2026	11247	Acme Gas	101.83	
3/15/2026	11248	Acme Phone Service	125.18	
4/15/2026	11250	Acme Electric	107.19	
4/15/2026	11252	Acme Phone Service	125.18	
5/15/2026	11253	Acme Electric	80.25	
5/15/2026	11255	Acme Gas	203.66	
5/15/2026	11256	Acme Phone Service	125.18	
6/15/2026	11258	Acme Electric	173.67	
6/15/2026	11259	Acme Gas	101.83	
6/15/2026	11260	Acme Phone Service	125.18	
7/15/2026	11261	Acme Electric	96.35	
7/15/2026	11262	Acme Gas	101.83	
7/15/2026	11263	Acme Phone Service	125.18	
	TOTAL, Paid from Item 17:		**5,817.15**	
	TOTAL:			**8,385.39**

Groceries (Budget: $4,800/year, P/C/O 11/1/25)

8/1/2025	11221	Jewel-Osco	506.00	
9/1/2025	11222	Jewel-Osco	312.00	
10/1/2025	11223	Jewel-Osco	445.00	
11/1/2025	11224	Jewel-Osco	506.00	
12/1/2025	11225	Jewel-Osco	312.00	
1/15/2026	11237	Jewel-Osco	445.00	
2/15/2026	11240	Jewel-Osco	506.00	
3/15/2026	11244	Jewel-Osco	312.00	
4/15/2026	11249	Jewel-Osco	445.00	
5/15/2026	11254	Jewel-Osco	506.00	
6/15/2026	11257	Jewel-Osco	312.00	
7/15/2026	11266	Jewel-Osco	445.00	
	TOTAL, Paid from Item 17:			**5,052.00**

Supplemental Health Insurance ($205/month, P/C/O 11/1/25)

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 17:			**2,700.00**

Allowance ($100/month, P/C/O 11/1/25)

MONTHLY		Jane Sample, $100/month @ 13 months	1,300.00	
	TOTAL, Paid from Item 17:			**1,300.00**

Recreational Activities (Budget: $3,500.00/year, P/C/O 11/1/25)

8/1/2025	320	Acme Council for Elderly Activities	600.00	
12/1/2025	361	Acme Council for Elderly Activities	800.00	
4/1/2026	379	Acme Council for Elderly Activities	200.00	
6/1/2026	398	Acme Council for Elderly Activities	700.00	
	TOTAL, Paid from Item 16:		**2,300.00**	
10/1/2025	11018	Acme Council for Elderly Activities	1,000.00	
2/10/2026	11277	Acme Council for Elderly Activities	450.00	
	TOTAL, Paid from Item 17:		**1,450.00**	
	TOTAL:			**3,750.00**

Miscellaneous/Discretionary Fund (Budget: $100/month, P/C/O 11/1/25)

8/1/2025	11011	Acme Services (Handyman repairs)	428.82	
9/1/2025	11012	City of Acme (Pet Registration)	18.00	
11/1/2025	11014	Fashions by Acme (item requested by Ward)	149.66	
12/1/2025	11015	Acme Duct Cleaning	1,061.28	
1/15/2026	11016	Acme Buy (item requested by Ward)	108.33	
3/15/2026	11018	Acme & Co (Tax Return Preparation)	57.61	
6/15/2026	11021	Acme Theatre	20.00	
	TOTAL, Paid from Item 17:			**1,843.70**

Medical

8/1/2025	383	Julie Acme (Dentist)	120.00	
12/1/2025	401	Acme Health Care (Heart Doctor)	40.00	
2/1/2026	395	Julie Acme (Dentist)	120.00	
4/1/2026	421	Acme Health Care (Heart Doctor)	40.00	
6/1/2026	432	Acme Health Care (Heart Doctor)	40.00	
	TOTAL, Paid from Item 16:			**360.00**

Prescriptions

8/1/2025	334	Acme Medco	146.00	
12/1/2025	336	Acme Medco	27.00	
2/1/2026	339	Acme Medco	300.00	
4/1/2026	340	Acme Medco	180.00	
6/1/2026	377	Acme Medco	268.00	
	TOTAL, Paid from Item 16:			**921.00**

TAXES

Income Taxes

3/15/2026	352	Illinois Department of Revenue	410.00	
3/15/2026	353	U.S. Treasury	2,300.00	
	TOTAL, Paid from Item 16:			**2,710.00**

Real Estate Taxes

2/25/2025	363	Cook County Treasurer (For Renters Lane property)	1,646.14	
2/25/2025	364	Cook County Treasurer (For Home Street property)	120.36	
	TOTAL, Paid from Item 16:		**1,766.50**	
12/1/2025	11005	Cook County Treasurer (For Renters Lane property)	1,874.12	
12/1/2025	11006	Cook County Treasurer (For Home Street property)	131.51	
	TOTAL, Paid from Item 17:		**2,005.63**	
	TOTAL:			**3,772.13**

FEES

8/1/2025		First Generic Bank, Annual Account Fee	50.00	
	TOTAL, Paid from Item 5:			**50.00**

Bondsman

8/7/2025		Acme & Sons Bonding Company	3,248.00	
	TOTAL, Paid from Item 17:			**3,248.00**

Guardian's Fees

NONE

Attorney's Fees

12/17/2025	11007	YOUR LAW FIRM, P.C., P/C/O 11/1/25	4,000.00	
12/17/2025	11008	APPOINTED LAW FIRM, P.C. (GAL), P/C/O 11/1/25	1,000.00	
	TOTAL, Paid from Item 17:			**5,000.00**

INVESTMENT PURCHASES

2/6/2026		300 Shares, New Generic, Ticker: NGI Value at Purchase on 2/26: $17.40/share *See Item 18D*	5,220.00	
	TOTAL, Paid from Item 18:			**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 7/25/25 from KBB.com	15,000.00
12	Tangible Personal Property	Assets On Hand
13	Beneficial Interest in the Estate of Florian Sample, Deceased Approximate beneficial interest: $40,000.00. Estate is pending in the Cook County Court under 25 P 9999.	

14		Cause of Action, Jane Sample v. Acme Trucking, Inc. et al. Personal injury lawsuit for damages sustained prior to Guardianship. Lawsuit is pending in the Cook County Court under 25 L 999 and is presently litigating a Motion to Dismiss.	
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 25 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 3)	
		Balance of Principal Liability as of 7/31/26	32,615.23
		Balance of Escrow Account as of 7/31/26	2,318.30
		Monthly Payment as of 7/31/26 Principal: 149.93, Interest: 489.57, Escrow: 278.78	918.28

SURETY BOND

This Court entered an initial Surety Bond of $350,000.00 on July 4, 2025. 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

Guardian's Annual Report
Regarding Ward **(05/15/25) CCP 0222 A**

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

Case No. _____ Calendar _____

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)],

_____ , having been appointed on _____
[printed name of the Guardian] [date of appointment]

as guardian of the person of _____ (the "Ward"), submits
[printed name of the person with a disability]

this annual Report 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**
_____	_____
_____	_____
_____	_____

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 ○ is ○ is not a need for continued guardianship because _____
_____
_____

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 the Guardian)

Service via email will be accepted at:
_____
by consent pursuant to Ill. Sup. Court Rules 11 and 131.

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

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, 2025 and continues to act in that capacity. Upon appointment, this Court approved a surety bond 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, 2025, 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

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

Exhibit "A" - Annual Budget

Expense	Monthly Allowance	Annual Allowance
Caretaker	$3,600.00	$43,000.00
Home Expenses (including general assessment of $225 per month and utilities)	$616.67	$7,400.00
Groceries	$500.00	$6,000.00
Supplemental Health Insurance (Acme Insurance)	$205.00	$2,460.00
Allowance	$100.00	$1,200.00
Recreational Activities	$291.67	$3,500.00
Discretionary Fund for other Personal Items for the Disabled Person	$100.00	$1,200.00
Total	$5,313.34	$64,760.00