

## **LSPR 98.06 GUARDIANSHIP OF ESTATE REPORTS**

When a conservator or trustee for the estate of an incapacitated person whose liquid assets exceed \$10,000.00 files a periodic report, in addition to providing the financial information required by statute, the conservator or trustee shall attach supporting documentation to the accounting. At a minimum, the supporting documentation shall include monthly bank statements for at least the first and last month of the reporting period, or, if the conservator or trustee is a bank or professional trustee, it may file a statement of account instead of monthly bank statements. The court retains discretion to require additional supporting information from the conservator or trustee or to waive this requirement for an individual report or, through a court order, future reports.

[Adopted effective September 1, 2017; Amended effective September 1, 2022.]