

# SAMPLE FORM

SUPREME COURT OF THE STATE OF NEW YORK  
COUNTY OF NEW YORK

IAS Part No. \_\_\_\_\_

-----X  
IN THE MATTER OF THE APPLICATION OF

Index No: \_\_\_\_\_

\_\_\_\_\_ ,

Petitioner,

FOR THE APPOINTMENT OF A GUARDIAN FOR

FINAL REPORT OF GUARDIAN

\_\_\_\_\_ ,

An Alleged Incapacitated Person.  
-----X

TO THE SUPREME COURT OF THE STATE OF NEW YORK, COUNTY OF NEW YORK:

I, John Smith of 145-21 85th Drive, Jamaica, New York, being the Guardian of the property of Jane Doe, an incapacitated person, do hereby make, render and file this Final Report, Account and inventory:

I was duly appointed as Guardian of the property of the within named incapacitated person by order of this court dated September 6th, 2004, and thereafter, pursuant to said order, did file with the County Clerk of the County of New York a bond with the Maryland Casualty Company as surety thereon, and have continuously acted as such Guardian since the date of my appointment.

That this Final Report of my proceedings as such Guardian is rendered and filed pursuant to Order of this Court made the 20th day of July, 2006.

## SUMMARY STATEMENT

SCHEDULE A PRINCIPAL RECEIVED	\$72,935.41
SCHEDULE A1 ADDITIONAL PRINCIPAL	\$ 3,853.76
TOTAL PRINCIPAL & ADDITIONAL PRINCIPAL	\$76,789.17
TOTAL INCOME	\$12,784.81
TOTAL PRINCIPAL, ADDITIONAL PRINCIPAL & INCOME	\$89,573.98
TOTAL DISBURSEMENTS	\$44,726.67
BALANCE ON HAND	\$44,873.30

## SCHEDULES

### SCHEDULE A

#### PRINCIPAL RECEIVED ON MY APPOINTMENT AS GUARDIAN

DIME SAVINGS BANK ACCOUNT # S5283650	\$72,150.24
CHEMICAL BANK ACCOUNT # 104-7202	\$ 1,785.17
TOTAL RECEIVED AT TIME OF APPOINTMENT	\$72,935.41

### SCHEDULE A1

ADDITIONAL PRINCIPAL RECEIVED IN 2006 FROM MORRIS FISHMAN	\$ 3,050.00
FROM MORRIS FISHMAN, MARINE MIDLAND ACCOUNT # 016-628703	\$ 803.76
TOTAL PRINCIPAL RECEIVED	\$76,789.17

### SCHEDULE B

#### INCOME RECEIVED

(Itemization of income by date is required for any accounting period  
not previously examined and confirmed by court order).

#### 2004

SOCIAL SECURITY 2 PAYMENTS AT 330.30 EACH	\$660.60
JAMAICA SAVINGS ACCT. # 2-208174 - INTEREST	\$ 228.63
CHEMICAL BANK ACCT. # 054068270 - INTEREST	\$ 17.84
DIME SAVINGS BANK ACCT. # M2385757 - INTEREST	\$ 766.47
TOTAL	\$1,673.54

#### 2005

SOCIAL SECURITY 6 PAYMENTS AT 330.30	\$1,981.80
ADDITIONAL SOCIAL SECURITY PAYMENT	\$ 50.00
SOCIAL SECURITY 6 PAYMENTS AT 357.30	\$ 2,143.80
JAMAICA SAVINGS BANK - INTEREST	\$ 1,331.62
DIME SAVINGS BANK - INTEREST	\$ 2,034.28
CHEMICAL SAVINGS BANK - INTEREST	\$ 4.83
TOTAL	\$7,546.33

2006

SOCIAL SECURITY	\$ 2,143.80
DIME SAVINGS BANK - INTEREST	\$ 1,047.57
JAMAICA SAVINGS BANK - INTEREST	\$ 233.49
CHEMICAL BANK - INTEREST	\$ 32.08
G.H.I. REFUND	\$ 108.00
TOTAL	\$ 3,564.94
TOTAL INCOME	\$12,784.81
TOTAL INCOME, PRINCIPAL & ADDITIONAL PRINCIPAL	\$89,573.98

SCHEDULE C  
DISBURSEMENTS

(Itemization of disbursements by date is required for any accounting period  
not previously examined and confirmed by court order).

2004

MADELINE DAYE, CARE MAINTENANCE AND SALARY	\$ 3,010.16
MADELINE DAYE, FOOD	\$ 586.65
NEW YORK CITY HOUSING AUTHORITY, RENT	\$ 338.80
TELEPHONE	\$ 211.58
LAUNDRY	\$ 19.00
UNDERWEAR	\$ 8.52
COURT EVALUATOR FEE, PER COURT ORDER	\$ 600.00
RICHARD DE VENUTO, LEGAL FEE AND DISBURSEMENTS PER COURT ORDER	\$ 1,225.00
SOCIAL SECURITY REFUND	\$ 42.71
MARYLAND CASUALTY, BOND PREMIUM	\$ 353.00
BANK CHARGES	\$ 4.00
TOTAL	\$ 6,399.42

2005

MADELINE DAYE, CARE AND MAINTENANCE	\$ 8,680.28
ZADA PALMER, CARE AND MAINTENANCE	\$ 1,375.00
SYBEL MORGAN, CARE AND MAINTENANCE	\$ 35.00
FOOD	\$ 2,088.96
LAUNDRY	\$ 144.91

TELEPHONE	\$ 699.19
INTERNAL REVENUE SERVICE	\$ 1,113.66
NEW YORK CITY HOUSING AUTHORITY - RENT	\$ 992.00
DR. EVAN C. SCHWEITZER	\$ 390.00
MEDICINES	\$ 50.89
UNDERCLOTHING ETC.	\$ 53.48
COURT EXAMINER FEE PER COURT ORDER	\$ 270.00
JOHN SMITH, COMPENSATION PER COURT ORDER	\$ 455.96
MARYLAND CASUALTY, BOND PREMIUM	\$ 290.00
AX-RET REPORTING SERVICE	\$ 42.85
STATE TAX COMMISSION	\$ 500.00
BANK CHARGES	\$ 32.00
TOTAL	\$17,184.18

2006

MADELINE DAYE, CARE AND MAINTENANCE	\$ 5,527.53
FEORENA BELL, CARE AND MAINTENANCE	\$ 42.00
FOOD	\$ 948.97
LAUNDRY	\$ 85.80
TELEPHONE	\$ 499.91
INTERNAL REVENUE SERVICE	\$ 533.13
NEW YORK STATE INCOME TAX	\$ 136.00
NEW YORK CITY INCOME TAX	\$ 46.00
NEW YORK CITY HOUSING AUTHORITY, RENT	\$ 435.15
DR. EVAN SCHWEITZER	\$ 300.00
MEDICINES	\$ 13.04
BANK CHARGES	\$ 6.00
AK-RET REPORTING INC.	\$ 797.05
HERZ & RYDER ESQS., LEGAL FEES PER COURT ORDER	\$ 6,025.00
DOUGLAS WITSCHIEBEN ESQ., REFEREE FEE	\$ 1,200.00
DUES	\$ 9.00
JEFFREY PEPPER, MINUTES	\$ 15.00
HERZ & RYDER ESQS., LEGAL FEES PER COURT ORDER	\$ 1,057.50
GRATUITIES	\$ 32.00
RABBI MORDECAI MAYER	\$ 65.00
RESNICK & BUCHBINDER INS., FUNERAL DIRECTORS	\$ 1,900.00
NEW YORK STATE UNEMPLOYMENT INSURANCE	\$ 426.02
DR. ISSAC H. SHOHET	\$ 25.00
NEW YORK TELEPHONE CO	\$ 17.97
TOTAL	\$27,143.07
TOTAL DISBURSEMENTS	\$44,726.67

SCHEDULE D  
BALANCE ON HAND

JAMAICA SAVINGS BANK ACCOUNT # 2-208174	\$3,669.18
DIME SAVINGS BANK ACCOUNT # M2385757	\$ 39,998.55
CHEMICAL BANK ACCOUNT	\$ 1,025.85
CHEMICAL BANK CHECKING ACCOUNT	\$ 179.78
TOTAL	\$44,873.36

SCHEDULE E  
CLAIMS AGAINST THE ESTATE

CLAIM OF THE DEPARTMENT OF SOCIAL SERVICES OF THE CITY OF NEW YORK	\$ 7,589.90
REIMBURSEMENT TO GUARDIAN FOR BANK CHARGES ADVANCED OUT OF HIS OWN FUNDS	\$ 26.00
COMPENSATION TO GUARDIAN - REASONABLE IN THE DISCRETION OF THE COURT	
LEGAL FEE TO HERZ & RYDER ESQS. - REASONABLE IN THE DISCRETION OF THE COURT	
MARYLAND CASUALTY CO. PREMIUM ON BOND	\$ 290.00

