

Rule 329. Individual conservatorship plan and inventory.

(a) Filing. Within 60 days from date of appointment the limited conservator or conservator shall file with the Court, pursuant to *D.C. Code § 21-2065 (b)* and (c), an individual conservatorship plan, together with a complete inventory of the estate designated by the order of the Court, unless the person appointed as temporary conservator pursuant to *D.C. Code § 21-2055(c)* is appointed as permanent conservator, in which case the filing of a second inventory shall not be required. The plan and inventory shall be substantially in the format prescribed by Form II-N. The inventory shall be verified by oath or affirmation of the limited conservator or conservator. If financial accounts are reported therein, a separate Probate Form 27 must be filed with the inventory including complete account numbers.

(b) Service. The limited conservator or conservator shall serve a copy of the plan and inventory upon the following individuals by first class mail within five days before or after the filing of the plan and inventory:

(1) The protected individual;

(2) All parties and their attorneys of record;

(3) The individual most closely related to the subject of the intervention proceeding by blood or marriage unless that individual's whereabouts is unknown and cannot be reasonably ascertained;

(4) The individual or facility, if any, having custody of the subject of the intervention proceeding;

(5) The individual, if any, proposed for appointment by a will as a guardian;

(6) The individual, if any, appointed or proposed for appointment as a guardian ad litem;

(7) The duly appointed guardian, if any;

(8) If no persons listed above exist, notice should be sent to any previously appointed visitor;

(9) Any person who has filed an effective request for notice pursuant to SCR-PD 304; and

(10) The Veterans Administration, if veterans benefits are being received by the protected individual. Proof of service shall be by certificate of service.

(c) Response to conservatorship plan. Any interested person may file a petition for modification of the conservatorship plan or request other appropriate relief in accordance with SCR-PD 322. If no petition to modify the conservatorship plan is filed, the plan will be placed in the file without court review or other action.

**COMMENT:**

If tangible personal property worth in excess of \$1,000 is reportable on the inventory, the conservator shall comply with SCR-Probate 333.

As to Form II-N, which is referred to in (a), see the Appendix of Forms and Probate Forms for Estates of Decedents Dying on or after July 1, 1995, following Rule 430.