

IN THE SUPREME COURT OF THE STATE OF ARIZONA

In the Matter of:)
)
AMENDING PROBATE FORMS 5) Administrative Order
THROUGH 9) No. 2025 - 147
) (Affecting Administrative Order
) No. 2012-65)
)
_____)

Administrative Order No. 2012-65 adopted Arizona Code of Judicial Administration (ACJA) § 3-302 and certain forms that are mandatory for use in probate cases. ACJA § 3-302 provides that the forms, associated schedules, worksheets, and instructions may be substantively modified by the supreme court, after review and recommendation of the Arizona Judicial Council.

Proposed amendments to Probate Forms 5 through 9 having come before the Arizona Judicial Council on June 24, 2025, were approved and recommended for adoption.

Therefore, pursuant to Article VI, Section 3, of the Arizona Constitution and ACJA § 3-302,

IT IS ORDERED that existing Probate Forms 5 through 9 are hereby amended and adopted as attached in Appendix A.

IT IS FURTHER ORDERED that Probate Forms 5 through 9 as attached hereto are approved for immediate use and are mandatory for use beginning August 13, 2025.

IT IS FURTHER ORDERED that the associated schedules, worksheets, and instructions as currently adopted for Probate Forms 5 through 9 remain unchanged and in effect.

Dated this 16th day of July, 2025.

FOR THE COURT:

ANN A. SCOTT TIMMER
Chief Justice

APPENDIX A

Form 5. Submission of and Petition for Approval of Conservatorship Estate Budget

Person Filing	
Address (if not protected)	
City, State, Zip Code	
Telephone	
Email Address	
Representing <input type="checkbox"/> Self or <input type="checkbox"/> Attorney for:	
Attorney Bar Number	
Licensed Fiduciary Number (if applicable)	

For Clerk's Use Only

SUPERIOR COURT OF ARIZONA
IN **COUNTY**

IN THE MATTER OF THE
CONSERVATORSHIP FOR

(Protected Person's Name)

- a Minor
- an Adult

Case Number:

**SUBMISSION OF AND PETITION FOR
APPROVAL OF CONSERVATORSHIP
ESTATE BUDGET**

Amendment

Assigned to:
(Judicial Officer)

1. This account covers the account reporting period from Click to enter a date to Click to enter a date and is due on Click to enter a date.

2. The REQUIRED DOCUMENTS are attached in the following order:
 - a. Inventory: Initial Inventory (including Protected Person's Credit Report)
 - b. SCHEDULE 1: Statement of Receipts and Disbursements
 - c. WORKSHEET A (if applicable): Other Receipts and Disbursements
 - d. Detail
 - e. SCHEDULE 2: Statement of Net Assets and Reconciliation
 - f. WORKSHEET B (if applicable): Other Inventory and Liabilities Detail

Case Number:

- g. SCHEDULE 3: Statement of Sustainability of Conservatorship
- h. WORKSHEET C (if applicable): Adjustments Detail

3. The current value of the estate is: \$ [Click to enter amount](#) (Form 5, Schedule 2, Line 19)

CONSERVATOR'S CERTIFICATION

I, the undersigned, certify under penalty of perjury that the foregoing petition and the attachments to the petition are true and correct.

Signature	<input type="text"/>	Date	<input type="text"/>
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Form 6. Submission of and Petition for Approval of First Conservator's Account

Person Filing	
Address (if not protected)	
City, State, Zip Code	
Telephone	
Email Address	
Representing <input type="checkbox"/> Self or <input type="checkbox"/> Attorney for:	
Attorney Bar Number	
Licensed Fiduciary Number (if applicable)	

For Clerk's Use Only

SUPERIOR COURT OF ARIZONA
IN **COUNTY**

IN THE MATTER OF THE
CONSERVATORSHIP FOR

(Protected Person's Name)

- a Minor
- an Adult

Case Number:

**SUBMISSION OF AND PETITION FOR
APPROVAL OF FIRST
CONSERVATOR'S ACCOUNT**

- with BUDGET
- Budget Amendment
- Fee Statement

Assigned to:
(Judicial Officer)

1. This account covers the account reporting period just ended from [Click to enter a date](#) to [Click to enter a date](#) and is due on [Click to enter a date](#).
2. Attached is a correct statement of all financial dealings I had on behalf of the ward or protected person during this account reporting period. The summary of all financial transactions I conducted or allowed on behalf of the ward or protected person during this period of time are fully described, itemized and summarized on the attached documents. I request that the Court enter an order approving this account.
3. The REQUIRED DOCUMENTS are attached in the following order:

Case Number:

- a. SCHEDULE 1: Statement of Receipts and Disbursements
- b. WORKSHEET A: Other Receipts and Disbursements Detail
- c. Amended Budget (if applicable)
- d. SCHEDULE 2: Statement of Net Assets and Reconciliation
- e. WORKSHEET B (if applicable): Other Inventory and Liabilities Detail
- f. SCHEDULE 3: Statement of Sustainability of Conservatorship
- g. WORKSHEET C (if applicable): Adjustments Detail
- h. Financial Statements, which include the account balance at the end of the account reporting period, for each financial account.
- i. Transaction Log, detailing all financial transactions during the account reporting period just ended, reported by category.

INSTRUCTIONS: For approval of fee statements, put a check mark in box number 4:

- 4. Attached is a copy of the Fee Statement for which I request approval. (If you check this box, attach the Fee statement).
- 5. The current value of the estate is: \$ [Click to enter amount](#) (Form 6, Schedule 2, Line 19)

CONSERVATOR'S CERTIFICATION

I, the undersigned, certify under penalty of perjury that the foregoing petition and the attachments to the petition are true and correct

Signature	<input type="text"/>	Date	<input type="text"/>
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Form 7. Submission of and Petition for Approval of Conservator's Account

Person Filing	<input type="text"/>
Address (if not protected)	<input type="text"/>
City, State, Zip Code	<input type="text"/>
Telephone	<input type="text"/>
Email Address	<input type="text"/>
Representing <input type="checkbox"/> Self or <input type="checkbox"/> Attorney for:	
<input type="text"/>	
Attorney Bar Number	<input type="text"/>
Licensed Fiduciary Number (if applicable)	<input type="text"/>

For Clerk's Use Only

SUPERIOR COURT OF ARIZONA
IN **COUNTY**

IN THE MATTER OF THE
 CONSERVATORSHIP FOR

(Protected Person's Name)

- a Minor
- an Adult

Case Number:

**SUBMISSION OF AND PETITION FOR
 APPROVAL OF CONSERVATOR'S
 ACCOUNT**

- with BUDGET
- Amendment
- Fee Statement

Assigned to:
 (Judicial Officer)

- This account covers the account reporting period just ended from Click to enter a date to Click to enter a date and is due on Click to enter a date.
- Attached is a correct statement of all financial dealings I had on behalf of the ward or protected person during this account reporting period. The summary of all financial transactions I conducted or allowed on behalf of the ward or protected person during this period of time are fully described, itemized and summarized on the attached documents. I request that the Court enter an order approving this account.
- The REQUIRED DOCUMENTS are attached in the following order:

Case Number:

- a. SCHEDULE 1: Statement of Receipts and Disbursements
- b. WORKSHEET A: Other Receipts and Disbursements Detail
- c. Amended Budget (if applicable)
- d. SCHEDULE 2: Statement of Net Assets and Reconciliation
- e. WORKSHEET B (if applicable): Other Inventory and Liabilities Detail
- f. SCHEDULE 3: Statement of Sustainability of Conservatorship
- g. WORKSHEET C (if applicable): Adjustments Detail
- h. Financial Statements, which include the account balance at the end of the account reporting period, for each financial account.
- i. Transaction Log, detailing all financial transactions during the account reporting period just ended, reported by category.

INSTRUCTIONS: For approval of fee statements, put a check mark in box number 4:

- 4. Attached is a copy of the Fee Statement for which I request approval. (If you check this box, attach the Fee statement).
- 5. The current value of the estate is: \$ Click to enter amount (Form 7, Schedule 2, Line 19)

CONSERVATOR’S CERTIFICATION

I, the undersigned, certify under penalty of perjury that the foregoing petition and the attachments to the petition are true and correct.

Signature	<input type="text"/>	Date	<input type="text"/>
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Form 8. Submission of and Petition for Approval of Final Conservator's Account

Person Filing	
Address (if not protected)	
City, State, Zip Code	
Telephone	
Email Address	
Representing <input type="checkbox"/> Self or <input type="checkbox"/> Attorney for:	
Attorney Bar Number	
Licensed Fiduciary Number (if applicable)	

For Clerk's Use Only

SUPERIOR COURT OF ARIZONA
IN **COUNTY**

IN THE MATTER OF THE
CONSERVATORSHIP FOR

--

(Protected Person's Name)

- a Minor
- an Adult

Case Number:

**SUBMISSION OF AND PETITION FOR
APPROVAL OF FINAL
CONSERVATOR'S ACCOUNT**

Fee Statement

Assigned to:
(Judicial Officer)

1. This account covers the account reporting period just ended from [Click to enter a date](#) to [Click to enter a date](#) and is due on [Click to enter a date](#).
2. Attached is a correct statement of all financial dealings I had on behalf of the ward or protected person during this account reporting period. The summary of all financial transactions I conducted or allowed on behalf of the ward or protected person during this period of time are fully described, itemized and summarized on the attached documents. I request that the Court enter an order approving this account.
3. The REQUIRED DOCUMENTS are attached in the following order:
 - a. SCHEDULE 1: Statement of Receipts and Disbursements
 - b. Amended Budget (if applicable)

Case Number:

- c. SCHEDULE 2: Statement of Net Assets and Reconciliation
- d. WORKSHEET B (if applicable): Other Inventory and Liabilities Detail
- e. Statement of Asset Distribution
- f. Financial Statements, which include the account balance at the end of the account reporting period, for each financial account.
- g. Transaction Log, detailing all financial transactions during the account reporting period just ended, reported by category.

INSTRUCTIONS: For approval of fee statements, put a check mark in box number 4:

- 4. Attached is a copy of the Fee Statement for which I request approval. (If you check this box, attach the Fee statement).
- 5. The current value of the estate is: \$ Click to enter amount (Form 8, Schedule 2, Line 19)

CONSERVATOR’S CERTIFICATION

I, the undersigned, certify under penalty of perjury that the foregoing petition and the attachments to the petition are true and correct.

Signature	<input type="text"/>	Date	<input type="text"/>
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Form 9. Submission of and Petition for Approval of Simplified Conservator's Account

Person Filing	<input type="text"/>
Address (if not protected)	<input type="text"/>
City, State, Zip Code	<input type="text"/>
Telephone	<input type="text"/>
Email Address	<input type="text"/>
Representing <input type="checkbox"/> Self or <input type="checkbox"/> Attorney for:	
<input type="text"/>	
Attorney Bar Number	<input type="text"/>
Licensed Fiduciary Number (if applicable)	<input type="text"/>

For Clerk's Use Only

SUPERIOR COURT OF ARIZONA
IN **COUNTY**

IN THE MATTER OF THE
 CONSERVATORSHIP FOR

(Protected Person's Name)

- a Minor
- an Adult

Case Number:

**SUBMISSION OF AND PETITION FOR
 APPROVAL OF SIMPLIFIED
 CONSERVATOR'S ACCOUNT**

- Amendment
- Fee Statement

Assigned to:
 (Judicial Officer)

1. This account covers the account reporting period just ended from Click to enter a date to Click to enter a date and is due on Click to enter a date.
2. Attached is a correct statement of all financial dealings I had on behalf of the ward or protected person during this account reporting period. The summary of all financial transactions I conducted or allowed on behalf of the ward or protected person during this period of time are fully described, itemized and summarized on the attached documents. I request that the Court enter an order approving this account.
3. The REQUIRED DOCUMENTS are attached in the following order:
 - a. SCHEDULE 1: Statement of Receipts and Disbursements
 - b. SCHEDULE 2: Statement of Net Assets and Reconciliation

Case Number:

- c. WORKSHEET B (if applicable): Other Inventory and Liabilities Detail
- d. SCHEDULE 3: Statement of Sustainability of Conservatorship
- e. WORKSHEET C (if applicable): Adjustments Detail
- f. Financial Statements, which include the account balance at the end of the account reporting period, for each financial account.
- g. Transaction Log, detailing all financial transactions during the account reporting period just ended, reported by category.

INSTRUCTIONS: For approval of fee statements, put a check mark in box number 4:

- 4. Attached is a copy of the Fee Statement for which I request approval. (If you check this box, attach the Fee statement).
- 5. The current value of the estate is: \$ Click to enter amount (Form 9, Schedule 2, Line 19)

CONSERVATOR'S CERTIFICATION

I, the undersigned, certify under penalty of perjury that the foregoing petition and the attachments to the petition are true and correct.

Signature	<input type="text"/>	Date	<input type="text"/>
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