

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar Number and Address)			FOR COURT USE ONLY
TELEPHONE NO.: _____ FAX NO. (Optional): _____ E-MAIL ADDRESS (Optional): _____ ATTORNEY FOR (Name): _____			
IN THE MATTER OF:			
Hearing Date:	Time:	Department:	CASE NUMBER:

**FINANCIAL DOCUMENT(S) COVER SHEET**  
**Probate Code § 2620(c)**

**NOTICE TO PETITIONER**

**All original documents submitted by fiduciaries in support of their inventory and appraisals or accountings as required by Probate Code 2620(c), including financial account statements, original closing escrow statements, and original residential care facility or long-term care facility bills must be lodged separately from the inventory and appraisal or accounting as a confidential document complying with California Rules of Court, Rule 2.100 et seq. To facilitate scanning, the document must be loosely bound and not stapled. The caption page for the document must include a statement regarding the total number of pages (including the cover sheet) submitted and a declaration by the fiduciary under penalty of perjury stating the documents attached are the originals. To facilitate return of the original document, the fiduciary must submit, at the time of filing, a self-addressed envelope with sufficient postage for mailing the documents or an attorney service pick up slip. Documents scanned by the Court shall constitute the Court’s permanent record of such documents. After the documents are scanned, the Clerk is authorized to return the documents to the fiduciary. The court will retain the documents in electronic form only. The fiduciary must retain the originals until the order approving the final account is final.**

To facilitate return of the original document, the fiduciary must submit, at the time of filing, a self-addressed envelope with sufficient postage for mailing the documents or an attorney service pick up slip.

1. Private Professional, Conservator, Guardian or Trustee:

Name: \_\_\_\_\_ Telephone Number: \_\_\_\_\_  
 Address: \_\_\_\_\_

2. Number of pages, including this cover sheet, being submitted: \_\_\_\_\_

I declare under penalty of perjury that the documents lodged with this cover sheet are the originals.

Date: \_\_\_\_\_

\_\_\_\_\_  
 SIGNATURE (PRIVATE PROFESSIONAL, CONSERVATOR, GUARDIAN, or TRUSTEE)