

Index

ABUSE, NEGLECT OR EXPLOITATION OF VULNERABLE ADULT

Generally, **9:1 to 9:9**
Definitions, **9:1**
Duty to report, **9:4**
Elder abuse registry, **9:7**
Endangerment by neglect, **9:5**
Financial exploitation, **9:6**
Form, allegation of self-dealing, **9:9**
Hearing process for elder abuse, **9:8**
Immunity of participants; non-privileged communication, **9:3**
Powers and duties of protective services, **9:2**

ACCEPTANCE, REJECTION, AND RESIGNATION OF APPOINTMENT

Trust Code, **10:19**

ACCOUNTS AND ACCOUNTING

Conservator's account
Generally, **6:84 to 6:88**
Petition to approve, **6:84**
Proposed order approving, **6:88**
Custodian, non-probate transfers, **7:19**
Expedited consideration of motion to restrict bank account, **4:97**
Non-probate transfers, **7:5, 7:19**
Probate of wills and administration, waiver of formal accounting, **4:89**
Proof of restricted account from depository, **6:80**

ACKNOWLEDGMENT

Probate of wills and administration, order to personal representative with acknowledgment and information to heirs, **4:79**
Protection of persons under disability and their property, order to

ACKNOWLEDGMENT—Cont'd
guardian and conservator and acknowledgment, **6:71**

ADJUSTMENT OF INCOME AND PRINCIPAL

Trust Code, **10:41**

ADMINISTRATION OF TRUST

Trust Code, **10:29**

ADOPTION OF CODE

Trust Code, **10:2**

ADVANCE DIRECTIVE “LIVING WILL” DECLARATION

Health care and end of life decisions, **2:10**

AFFIDAVITS

Probate of wills and administration, succession to real property, **4:94, 4:95**
Protection of persons under disability and their property, proposed appointee, **6:64**

AFTER-ACQUIRED PROPERTY

Intestate succession and wills, passage, **3:20**

ALLOWANCE

Intestate succession and wills, family allowances, **3:6**
Probate of wills and administration, formal probate
Allowance of claims, **4:45**
Notice of disallowance of claim against estate, **4:87**

ANIMALS, TRUSTS FOR CARE OF

Trust Code, **10:6**

ANNUAL REPORTS

Conservator's annual account and report, petition to approve, **6:84**
Guardian, **6:82**

ANNUAL REPORTS—Cont'd

Physician's annual report to guardian,
6:83

ANNULMENT OF MARRIAGE

Intestate succession and wills, revocation and amendment, **3:18**

APPOINTMENT

Affidavit of proposed appointee, **6:64**

Conservatorship

Conservator, **6:30**

Order appointing permanent conservator, **6:68**

Order appointing temporary guardian, **6:67**

Petition for appointment of permanent guardian of an adult, **6:66**

Petition for appointment of temporary guardian of an adult, **6:65**

Court appointed fiduciary, relationship of attorney in fact to, **6:57**

Formal appointment proceedings, **4:14**

Guardian for minor

Generally, **6:12**

Guardianship

Acceptance of appointment, **6:12, 6:22**

Appointment of guardian of minor, **6:12**

Formal appointment of guardian of incapacitated person, **6:19**

Order appointing permanent guardian, **6:68**

Order appointing permanent guardian with authority to consent to inpatient mental health care and treatment, **6:74**

Order appointing temporary guardian, **6:67**

Order appointing temporary guardian with authority to consent to inpatient mental health care and treatment, **6:75**

Petition for appointment of permanent guardian of an adult, **6:66**

APPOINTMENT—Cont'd

Guardianship—Cont'd

Petition for appointment of permanent guardian with authority to consent to inpatient mental health care and treatment, **6:73**

Petition for appointment of temporary guardian of an adult, **6:65**

Petition for appointment of temporary guardian with authority to consent to inpatient mental health care and treatment, **6:72**

Priority for appointment, **6:21**

Proceedings subsequent to appointment, **6:26**

Termination of appointment, **6:15**

Informal probate and appointment, **4:7**

Personal representative

Generally, **4:24**

Application, **4:74, 4:76**

Informal appointment

Application for, **4:70**

Heirs, proof of mailing notice to, **4:82**

Notice to heirs, **4:80, 4:81**

Proof of mailing notice to heirs, **4:82**

Statement of, **4:71**

Notice to heirs of appointment, **4:81**

Proof of mailing notice to heirs

Informal appointment, **4:82**

Informal probate, **4:83**

Renunciation of right to appointment as personal representative and consent to appointment as personal representative without bond, **4:74**

Statement for appointment, **4:77**

Priority for appointment, **4:6**

Relationship of attorney in fact to court appointed fiduciary, **6:57**

Successor trustee, Trust Code, **10:22**

INDEX

APPOINTMENT—Cont'd

Termination of appointment
Guardianship, **6:15**

APPOINTMENT POWERS

Trust Code, **10:54**

ARIZONA TRUST CODE

Trust Code, this index

ATTORNEYS

Court appointed fiduciary, relationship of attorney in fact to, **6:57**
Motion for limited waiver of attorney-client privilege, **4:96**
Powers of Attorney, this index

ATTORNEYS' FEES

Trust Code, **10:75**

AUTOMOBILES

Non-probate transfers, **7:8**

AVOIDANCE OF TRANSFER

Probate of wills and administration, **4:34**

BENEFICIARY AGREEMENTS

Probate of wills and administration, **4:64**

BENEFICIARY DEED

Non-probate transfers, **7:7**

BOND

Consent to appointment as personal representative without bond, **4:74**
Conservatorships, **6:31**
Formal probate, **4:29**
Non-probate transfers, bond of custodian, **7:16**
Trust Code, **10:20**

BREACH OF FIDUCIARY DUTY

Probate of wills and administration, **4:39**

BREACH OF TRUST

Trust Code, **10:72**

BURDEN OF PROOF

Probate of wills and administration, **4:23**

CAPACITY AND INCAPACITY

Protection of Persons Under Disability and Their Property, this index
Representing parties with diminished capacity, **1:4**

CHARITABLE TRUSTS

Trust Code, **10:5**

CHILDREN

Appointment of guardian of minor, **6:12**
Duties of guardian of a minor, **6:13**
Guardians of minors, generally, **6:11**
Intestate succession and wills, **3:3, 3:5**
Non-probate transfers, transfers to minors, **7:10**

CLOSING STATEMENT

Probate of wills and administration, **4:92**

COLLECTION OF WAGES AND PERSONAL PROPERTY

Probate of wills and administration, **4:68**

COMMENCING AND CONTESTING PROCEEDINGS

Trust Code, **10:70**

COMPENSATION

Formal probate, **4:30**
Non-probate transfers, custodian, **7:16**
Probate of wills and administration, collection of wages, **4:68**
Trust Code, **10:24**

COMPROMISE CLAIM

Protection of persons under disability and their property, conservatorships, **6:46**

COMPROMISE OF CLAIMS

Probate of wills and administration, **4:53, 4:54**

CONDEMNATION

Intestate succession and wills, sale of unpaid proceeds, **3:24**

CONFIDENTIAL

COMMUNICATIONS

- Abuse, neglect or exploitation of vulnerable adult, non-privileged communication, **9:3**
- Privilege between behavioral health professional and principal, **2:8**

CONFLICT OF INTEREST

- Formal probate, **4:37**

CONSERVATORSHIP

- Estate Planning and Probate, this index

CONSTRUCTION OF WILL

- Failure of testamentary provision, **3:22**
- Nonexoneration, **3:25**
- Passage of existing and after-acquired property by will, **3:20**
- Right to specific devises, **3:24**
- Satisfaction of a devise during the testator's life, **3:27**
- Securities increase in value after death, **3:23**
- Specific devise, **3:25**
- Substitute and gifts, **3:21**
- Unpaid proceeds of sale, condemnation or insurance; sale by conservator or agent, **3:24**

CONTRACT TO MAKE WILL

- Generally, **3:13**

CO-PERSONAL

REPRESENTATIVES

- Probate of wills and administration, **4:36**

CO-TRUSTEES

- Trust Code, **10:23**

CREATION OF TRUST

- Trust Code, **10:3**

CREDITORS

- Non-probate transfers, **7:3, 7:4**
- Probate of wills and administration
 - Claims of creditor, **4:40**
 - Notice to creditors
 - Generally, **4:84**
 - Alternate form, **4:85**

CREDITORS—Cont'd

- Probate of wills and administration
 - Cont'd
 - Notice to creditors—Cont'd
 - Proof of mailing, **4:86**

CUSTODIAN AND CUSTODIAL PROPERTY

- Accounting by custodian, **7:19**
- Creation of custodial property, **7:13**
- Expenses, compensation and bond of custodian, **7:16**
- Nomination of custodian, **7:11**
- Powers of custodian and use of custodial property, **7:15**
- Renunciation, resignation, death or removal of custodian, **7:18**
- Termination of custodianship, **7:20**

CY PRES

- Trust Code, **10:46**

DEATH

- Intestate succession and wills, rules of construction for securities that increase in value after death, **3:23**
- Non-probate transfers
 - Notice to creditors on death of settlor of trust, **7:4**
 - Renunciation, resignation, death or removal of custodian, **7:18**
- Protection of persons under disability and their property
 - Powers of attorney, revocation and effect of death, **6:56**

DECANTING

- Trust Code, **10:40**

DEED OF DISTRIBUTION

- Probate of wills and administration, **4:91**

DEFINITIONS

- Abuse, neglect or exploitation of vulnerable adult, **9:1**
- Disclaimer of property interests, **8:2**
- Public and private fiduciaries, **6:61**

DISABILITY, PERSONS UNDER

- Protection of Persons Under Disability and Their Property, this index

INDEX

DISCLAIMER OF PERSONAL INTEREST

Petition to enforce, **4:98**

DISCLAIMER OF PROPERTY INTERESTS

Generally, **8:1 to 8:9**

Defined, **8:2**

Effect, **8:7**

Recording, **8:9**

Requirements, **8:4**

Restrictions, **8:4**

Scope of disclaimer, **8:3**

Tax qualified disclaimers, **8:8**

Time when effective, **8:6**

DISCLAIMERS

Trust Code, **10:55**

DISPOSITION OF REMAINS

Responsibility for decisions and payment, **2:15**

DISTRIBUTIONS

Probate of Wills and Administration, this index

Trust Code, **10:61**

DIVORCE

Intestate succession and wills, revocation and amendment, **3:18**

DUAL ROLES, PARTIES WITH

Fiduciary and beneficiary, representing parties with dual roles, **1:5**

DUTY TO REPORT

Abuse, neglect or exploitation of vulnerable adult, **9:4**

ELDER ABUSE REGISTRY

Generally, **9:7**

ELECTRONIC WILLS

Generally, **3:14**

EMERGENCY MOTION FOR INSTRUCTIONS

Estate administration, **4:101**

ENCUMBERED ASSETS

Probate of wills and administration, **4:50**

ENDANGERMENT

Neglect of vulnerable adult, **9:5**

ESTATE PLANNING AND PROBATE

Generally, **1:1 to 1:6**

Conservatorships. Protection of Persons Under Disability and Their Property, this index

Disclaimer of Personal Interest, this index

Ethical concerns, **1:1**

Fee structure and reasonableness, **1:6**

Forms of foreign personal representative administration, **5:1, 5:2**

Guardianships. Protection of Persons Under Disability and Their Property, this index

Health Care and End of Life Decisions, this index

Identifying the client, **1:2**

Intestate Succession and Wills, this index

Non-Probate Transfers, this index

Probate of Wills and Administration, this index

Protection of Persons Under Disability and Their Property, this index

Representing multiple parties, **1:3**

Representing parties with diminished capacity, **1:4**

Representing parties with dual roles (fiduciary and beneficiary), **1:5**

Vulnerable adult. Abuse, Neglect or Exploitation of Vulnerable Adult, this index

ETHICS

Estate planning and probate, **1:1**

EXECUTION AND LEVY

Probate of wills and administration, prohibition, **4:52**

EXEMPT PROPERTY

Intestate succession and wills, **3:6**

EXPENSES

Non-probate transfers, custodian, **7:16**

EXPLOITATION OF PERSON

Vulnerable adult. Abuse, Neglect or
Exploitation of Vulnerable
Adult, this index

FAMILY ALLOWANCES

Intestate succession and wills, **3:6**

FEES

Estate planning and probate, fee
structure and reasonableness,
1:6

FIDUCIARIES

Definitions, **6:61**
Powers of attorney, relationship of
attorney in fact to court
appointed fiduciary, **6:57**
Private fiduciaries, **6:60**
Probate of wills and administration,
breach of fiduciary duty, **4:39**
Public fiduciary, **6:73**
Representing parties with dual roles
(fiduciary and beneficiary), **1:5**

FINANCIAL EXPLOITATION

Vulnerable adult, **9:6**

**FOREIGN JURISDICTIONS,
TRUSTS CREATED IN**

Trust Code, **10:4**

**FOREIGN PERSONAL
REPRESENTATIVE AND
ANCILLARY
ADMINISTRATION**

Assisting, **5:3**
Forms of foreign personal representa-
tive administration, **5:1**
Supervision over foreign personal
representatives, **5:2**

FORMAL PROBATE

Probate of Wills and Administration,
this index

FORMS

Abuse, neglect or exploitation of
vulnerable adult, self-dealing,
9:9

**FRAUD, DURESS, OR UNDUE
INFLUENCE**

Trust Code, **10:9**

FUNDING OF TRUST

Trust Code, **10:57**

GENERAL TRUSTEE POWERS

Trust Code, **10:38**

GIFTS

Intestate succession and wills, rules
of construction, **3:21**
Organ or tissue donation, **2:14**
Protection of persons under disability
and their property, conservator-
ships, **6:44**

GOVERNING LAW

Trust Code, **10:58**

GUARDIANSHIP

Estate Planning and Probate, this
index

**HEALTH CARE AND END OF LIFE
DECISIONS**

Generally, **2:1 to 2:17**
Advance directive “living will” dec-
laration, **2:10**
Creation of Health Care Power of
Attorney, **2:2**
Disposition of remains, responsibility
for decisions and payment, **2:15**
Duties of health care agents, **2:5**
Mental health care power of attorney
Creation, **2:6**
Revocation, **2:7**
Organ or tissue donation, **2:14**
Physician’s directives
Coordination with surrogate health
care decision maker, **2:11**
Creation of living will, **2:9**
Pre-hospital medical care directive,
2:12
Pre-hospital medical care directive
form, **2:13**
Privilege between behavioral health
professional and the principal,
2:8
Protecting agent and others caring for
principal, **2:16**

INDEX

HEALTH CARE AND END OF LIFE DECISIONS—Cont'd

Revocation

Health care powers of attorney, **2:4**

Mental health care power of attorney, **2:7**

Significant relationships, contact with, **2:17**

Surrogate health care decision makers, **2:1**

HEARINGS

Elder abuse, hearing process, **9:8**

Probate of wills and administration, **4:16**

Protection of persons under disability and their property, notice of hearing, **6:79**

HOLOGRAPHIC WILLS

Generally, **3:10**

IDENTIFICATION OF BENEFICIARY

Trust Code, **10:14**

IDENTIFICATION OF CLIENT

Generally, **1:2**

IDENTIFICATION OF SETTLOR

Trust Code, **10:11**

IMMUNITY

Abuse, neglect or exploitation of vulnerable adult, immunity of participants, **9:3**

IMPARTIALITY

Trust Code, **10:31**

INFORM, DUTY TO

Trust Code, **10:34**

INFORMAL ESTATE CLOSING PROCEDURES

Generally, **4:65**

IN KIND DISTRIBUTION

Probate of wills and administration, **4:55**

INPATIENT MENTAL HEALTH CARE AND TREATMENT

Letters and acceptance of permanent guardian with authority to consent to, **6:77**

INPATIENT MENTAL HEALTH CARE AND TREATMENT

—Cont'd

Letters and acceptance of temporary guardian with authority to consent to, **6:76**

Order appointing permanent guardian with authority to consent to, **6:74**

Order appointing temporary guardian with authority to consent to, **6:75**

Order to guardian with authority to consent to, **6:78**

Petition for appointment of permanent guardian with authority to consent to, **6:73**

Petition for appointment of temporary guardian with authority to consent to, **6:72**

INSTRUMENT OF TRUST

Trust Code, **10:10**

INSURANCE

Intestate succession and wills, sale of unpaid proceeds, **3:24**

INTEREST

Probate of wills and administration, right to interest after one year, **4:63**

INTESTATE SUCCESSION AND WILLS

Generally, **3:1 to 3:28**

Amendment of will. Revocation and amendment, below

Contract to make will, **3:13**

Electronic wills, **3:14**

Execution of will, **3:7**

Exempt property and family allowances, **3:6**

Forms

Answer to petition for restoration of wrongfully disbursed funds, **3:25**

Sample will, **3:28, 3:29**

Holographic wills, **3:10**

Intestate succession, generally, **3:1**

**INTESTATE SUCCESSION AND
WILLS—Cont'd**

Outside documents, wills referring to,
3:11

Penalty clauses, **3:12**

Requirements of will, **3:9**

Revocation and amendment

Divorce, annulment or legal
separation, **3:18**

Effect of revocation on prior wills,
3:16

Murder of decedent, **3:19**

Requirements for revocation, **3:15**,
3:16

Revocation by matter of law, **3:17**

Rights of spouses and children, **3:3**

Rules of construction

Failure of testamentary provision,
3:22

Nonexoneration, **3:25**

Passage of existing and after-
acquired property by will,
3:20

Right to specific devises, **3:24**

Satisfaction of a devise during the
testator's life, **3:27**

Securities increase in value after
death, **3:23**

Specific devise, **3:25**

Substitute and gifts, **3:21**

Unpaid proceeds of sale,
condemnation or insurance;
sale by conservator or agent,
3:24

Sample will, **3:28, 3:29**

Spouse and children unprovided for
in will, **3:5**

Waiver of rights of spouse, **3:4**

Who may make will, **3:8**

INVENTORY

Protection of persons under disability
and their property, conservator-
ships, **6:36**

INVESTMENT

Trust Code, **10:37, 10:60**

JUDICIAL PROCEEDINGS

Trust Code, **10:66 et seq.**

JURISDICTION

Foreign personal representative, court
supervision over, **5:2**

Protection of persons under disability
and their property, **6:2**

Trust Code, **10:67**

LEGAL SEPARATION

Intestate succession and wills, revo-
cation and amendment, **3:18**

LEVY AND EXECUTION

Probate of wills and administration,
prohibition, **4:52**

LIMITATION OF ACTIONS

Probate of wills and administration,
4:42

Trust Code, **10:73**

LIMITED LIABILITY COMPANY

Non-probate transfers, **7:9**

LIVING WILL

Advance directive "living will" dec-
laration, **2:10**

Creation, physician's directives, **2:9**

LOST ORIGINAL WILL

Probate of wills and administration,
4:25

LOYALTY, DUTY OF

Trust Code, **10:30**

MAILING NOTICE

Creditor, **4:86**

Heirs

Notice of informal appointment of
personal representative, **4:82**

Notice of informal probate of will
and appointment of personal
representative, **4:83**

**MENTAL HEALTH CARE AND
TREATMENT**

Guardianships, mental health treat-
ment of ward, **6:24**

Inpatient Mental Health Care and
Treatment, this index

Mental health care power of attorney

Creation, **2:6**

Revocation, **2:7**

INDEX

MISSING ORIGINAL WILL

Probate of wills and administration,
4:25

MODIFICATION AND TERMINATION

Trust Code, **10:42 et seq.**

MULTIPLE PARTIES

Representation, **1:3**

MULTIPLE STATE ADMINISTRATION

Probate of wills and administration,
4:47

MURDER OF DECEDENT

Intestate succession and wills, revocation and amendment, **3:19**

NAME CHANGE

Trust Code, **10:51**

NEGLECT OF PERSON

Vulnerable adult. Abuse, Neglect or
Exploitation of Vulnerable
Adult, this index

NOMINATION

Non-probate transfers, custodian,
7:11

NONCHARITABLE TRUSTS WITHOUT ASCERTAINABLE BENEFICIARY

Trust Code, **10:7**

NONJUDICIAL SETTLEMENT AGREEMENT

Trust Code, **10:53**

NON-PROBATE TRANSFERS

Generally, **7:1 to 7:20**
Accounting by custodian, **7:19**
Accounts, **7:5**
Automobiles, **7:8**
Beneficiary deed, real property, **7:7**
Creation of custodial property, **7:13**
Expenses, compensation and bond of
custodian, **7:16**
Liability to creditors and statutory
allowances, **7:3**
Liability to third persons, **7:17**

NON-PROBATE TRANSFERS

—Cont'd

Limited liability company, interest in,
7:9
Minors, transfers to, **7:10**
Nomination of custodian, **7:11**
Non-testamentary in nature, **7:1**
Notice to creditors on death of settlor
of trust, **7:4**
Powers of custodian and use of
custodial property, **7:15**
Real property, **7:7**
Renunciation, resignation, death or
removal of custodian, **7:18**
Securities, **7:6**
Termination of custodianship, **7:20**
Transfer by gift or inheritance, **7:12**
Validity and effect of transfer, **7:14**

NONRESIDENT DECEDENT

Probate of wills and administration,
4:61

NOTIFICATION, DUTY OF

Trust Code, **10:35**

OBJECTIONS

Probate of wills and administration,
4:20

ORAL TRUSTS

Trust Code, **10:8**

ORGAN OR TISSUE DONATION

Generally, **2:14**

PARTITION

Probate of wills and administration,
4:58

PAYMENT

Disposition of remains, responsibility
for payment, **2:15**
Formal probate, claims, **4:46**

PENALTY CLAUSES

Trust Code, **10:71**
Wills, **3:12**

PERSONAL INTEREST

Disclaimer of Personal Interest, this
index

PERSONAL INTEREST—Cont'd

- Formal probate, conflict of interest, **4:37**
- Probate of wills and administration, distribution, **4:63**

PERSONAL LIABILITY

- Trust Code, **10:26**

PHYSICIANS

- Directives of physician
 - Coordination with surrogate health care decision maker, **2:11**
 - Creation of living will, **2:9**
 - Pre-hospital medical care directive, **2:12**
- Guardian, annual report to, **6:83**

POWERS OF APPOINTMENT

- Exercise, **3:26**

POWERS OF ATTORNEY

- Health care power of attorney
 - Creation, **2:2**
 - Revocation, **2:7**
- Mental health care power of attorney
 - Creation, **2:6**
 - Revocation, **2:7**
- Protection of persons under disability and their property
 - Creation of powers of attorney, **6:55**
 - Liability for misuse of power of attorney, **6:58**
 - Relationship of attorney in fact to court appointed fiduciary, **6:57**
 - Revocation and effect of death, **6:56**
- Revocation
 - Health care powers of attorney, **2:4**
 - Mental health care power of attorney, **2:7**
 - Protection of persons under disability and their property, **6:56**

PRE-HOSPITAL MEDICAL CARE DIRECTIVE

- Physician's directives, **2:12**

PRIORITIES

- Protection of persons under disability and their property, priority for appointment as guardian, **6:21**

PROBATE OF WILLS AND ADMINISTRATION

- Generally, **4:1 et seq.**
- Appointment proceedings, **4:13**
- Attorney-client privilege, motion for limited waiver, **4:96**
- Distribution
 - Beneficiary agreements, **4:64**
 - Collection of wages and personal property, **4:68**
 - Distributee's liability for improper distribution, **4:56**
 - Informal estate closing procedures, **4:65**
 - In kind distribution, **4:55**
 - No administration, successor's rights, **4:60**
 - Nonresident decedent, **4:61**
 - Partition of assets, petition, **4:58**
 - Petition for partition of assets, **4:58**
 - Right of retainer, **4:62**
 - Right to interest after one year, **4:63**
 - Succession to real property, **4:69**
 - Summary administration, **4:67**
 - Third-party protection, **4:57**
- Emergency motion for instructions regarding estate administration, **4:101**
- Expedited consideration of motion to restrict bank account, **4:97**
- Formal probate
 - Allowance of claims, **4:45**
 - Appointment of personal representative, **4:24**
 - Bond, **4:29**
 - Breach of fiduciary duty, **4:39**
 - Burden of proof, **4:23**
 - Claims not due or contingent, **4:51**
 - Compensation, **4:30**
 - Compromise of claims, **4:53, 4:54**
 - Conflict of interest, **4:37**
 - Co-personal representatives, **4:36**
 - Creditor claims, **4:40**

INDEX

PROBATE OF WILLS AND ADMINISTRATION—Cont'd

Formal probate—Cont'd

Duties and powers of personal representative, **4:31 et seq.**

Encumbered assets, **4:50**

Execution and levies prohibited, **4:52**

Findings on formal probate, **4:17**

Formal testacy and appointment proceedings, **4:14**

Hearing and notice, **4:16**

Liability of personal representative, **4:48**

Limitation on presentation of claims, **4:43**

Lost or missing original will, **4:25**

Manner of presentation of claims, **4:44**

Multiple state administration, **4:47**

Objection to probate, **4:20**

Order is final, exceptions, **4:18**

Order restraining personal representative, **4:35**

Payment of claims, **4:46**

Personal representative, **4:27**

Powers of personal representative and transactions authorized, **4:31 et seq.**

Power to avoid transfer, **4:34**

Procedure for filing, **4:15**

Secured claims, **4:49**

Special administrator, **4:31 et seq.**

Statute of limitations, **4:42**

Supervised administration, **4:26**

Third-party protection, **4:38**

Uncontested cases, **4:19**

Forms

Acceptance of personal representative, **4:73, 4:78**

Affidavit for succession to real property

Generally, **4:95**

Intestate, **4:94**

Application for informal appointment of personal representative, **4:70**

Application for informal probate of will and for appointment of

PROBATE OF WILLS AND ADMINISTRATION—Cont'd

Forms—Cont'd

personal representative, **4:75, 4:76**

Attorney-client privilege, motion for limited waiver, **4:96**

Closing statement, **4:92**

Deed of distribution, **4:91**

Emergency motion for instructions regarding estate administration, **4:101**

Expedited consideration of motion to restrict bank account, **4:97**

Heirs of informal appointment of personal representative, proof of mailing notice to, **4:82**

Informal appointment of personal representative

Application for, **4:70**

Heirs, proof of mailing notice to, **4:82**

Notice to heirs of, **4:80**

Statement of, **4:71**

Informal probate of will and appointment of personal representative

Application for, **4:75, 4:76**

Notice to heirs, **4:81**

Statement of, **4:77**

Inventory and appraisal, **4:88**

Letters of personal representative, **4:72**

Notice of disallowance of claim against estate, **4:87**

Notice to creditors

Generally, **4:84**

Alternate form, **4:85**

Proof of mailing, **4:86**

Notice to heirs of informal appointment of personal representative, **4:80**

Order to personal representative with acknowledgment and information to heirs, **4:79**

Proof of mailing notice

Creditor, **4:86**

Heirs, notice of informal appointment of personal

**PROBATE OF WILLS AND
ADMINISTRATION—Cont'd**

Forms—Cont'd

Proof of mailing notice—Cont'd
representative, **4:82**

Heirs, notice of informal probate
of will and appointment of
personal representative,
4:83

Receipt of final distribution, **4:90**

Removal of personal representa-
tive, petition for, **4:99, 4:100**

Renunciation and disclaimer of
inheritance, petition to
enforce, **4:98**

Renunciation of right to appoint-
ment as personal representa-
tive and consent to appoint-
ment as personal
representative without bond,
4:74

Request for informal closing of
probate estate, **4:93**

Statement of informal appointment
of personal representative,
4:71

Statement of informal probate of
will and for appointment of
personal representative, **4:77**

Waiver of formal accounting and
release and consent to dis-
charge personal representa-
tive, **4:89**

Informal probate and appointment,
4:7

Notice requirements, **4:12**

Priority for appointment, **4:6**

Proof and findings required, **4:11**

Proposals for distribution, **4:64**

Registrar's duty, **4:10**

Removal of personal representative,
petition for, **4:99, 4:100**

Renunciation and disclaimer of inher-
itance, petition to enforce, **4:98**

Special administrator, **4:5**

Unavailable in certain cases, **4:8**

Venue for probate and administration,
4:4

Who may file for informal proceed-
ings, **4:9**

PROPERTY OF TRUST, DUTY TO
Trust Code, **10:33**

PROPOSALS FOR DISTRIBUTION

Probate of wills and administration,
4:64

**PROTECTION OF PERSONS
UNDER DISABILITY AND
THEIR PROPERTY**

Generally, **6:1 et seq.**

Conservatorships

Appointment of conservator, **6:30**

Bond, **6:31**

Budgets and sustainability reports,
6:37

Compromise claim, **6:46**

Conservatorships, in general, **6:28**

General duties and powers of con-
servator, **6:33**

Gifting, **6:44**

Inventory and records, **6:36**

Non-conservator protective
arrangements and single
transaction authority, **6:53**

Personal liability of conservator,
6:48

Preservation of protected person's
estate plan, **6:45**

Submission of and petition for
approval of budget, **6:81**

Temporary conservator, **6:54**

Third parties dealing with conser-
vator, **6:43**

Titling of assets, **6:36**

Transactions by conservator, **6:42**

Forms

Affidavit of proposed appointee,
6:64

Annual report of guardian, **6:82**

Letters and acceptance of perma-
nent guardian and conservator
of an adult, **6:70**

Letters and acceptance of perma-
nent guardian with authority
to consent to inpatient mental
health care and treatment,
6:77

Letters and acceptance of
temporary guardian and con-

INDEX

PROTECTION OF PERSONS UNDER DISABILITY AND THEIR PROPERTY—Cont'd

Forms—Cont'd

servator of an adult, **6:69**

Letters and acceptance of
temporary guardian with
authority to consent to
inpatient mental health care
and treatment, **6:76**

Notice of hearing, **6:79**

Order appointing permanent guard-
ian and conservator, **6:68**

Order appointing permanent guard-
ian with authority to consent
to inpatient mental health care
and treatment, **6:74**

Order appointing temporary guard-
ian and conservator, **6:67**

Order appointing temporary guard-
ian with authority to consent
to inpatient mental health care
and treatment, **6:75**

Order to guardian and conservator
and acknowledgment, **6:71**

Order to guardian with authority to
consent to inpatient mental
health care and treatment,
6:78

Petition for appointment of perma-
nent guardian and conservator
of an adult, **6:66**

Petition for appointment of perma-
nent guardian with authority
to consent to inpatient mental
health care and treatment,
6:73

Petition for appointment of
temporary guardian and con-
servator of an adult, **6:65**

Petition for appointment of
temporary guardian with
authority to consent to
inpatient mental health care
and treatment, **6:72**

Petition to approve annual account
and report of conservator,
6:84

Physician's annual report to guard-
ian, **6:83**

PROTECTION OF PERSONS UNDER DISABILITY AND THEIR PROPERTY—Cont'd

Forms—Cont'd

Proof of restricted account from
depository, **6:80**

Proposed order approving account
and report of conservator,
6:88

Submission of and petition for
approval of accounts, **6:84 to
6:87**

Submission of and petition for
approval of budget, **6:81**

Guardianships

Acceptance of appointment, **6:12,
6:22**

Appointment of guardian of minor,
6:12

Duties of guardian of a minor, **6:13**

Formal appointment of guardian of
incapacitated person, **6:19**

General duties of a guardian, **6:23**

Guardianships, in general, **6:10**

Guardians of minors, **6:11**

Mental health treatment of ward,
6:24

Priority for appointment, **6:21**

Proceedings subsequent to appoint-
ment, **6:26**

Removal of guardian, **6:14**

Resignation of guardian, **6:27**

Substitution of guardian, **6:27**

Temporary guardianship, **6:25**

Termination of appointment, **6:15**

Termination of guardianship and
substitution or resignation of
guardian, **6:27**

Jurisdiction and venue, **6:2**

Powers of attorney

Creation of powers of attorney,
6:55

Liability for misuse of power of
attorney, **6:58**

Relationship of attorney in fact to
court appointed fiduciary,
6:57

Revocation and effect of death,
6:56

**PROTECTION OF PERSONS
UNDER DISABILITY AND
THEIR PROPERTY—Cont'd**

Prudent management, **6:4**
Public and private fiduciaries
Definitions, **6:61**
Private fiduciaries, **6:60**
Public fiduciary, **6:73**
Repetitive filings, **6:12**
Submission of and petition for
approval of conservatorship
budget, **6:81**
Supported decision-making agree-
ment
Background, **6:62**
Generally, **6:63**
Vexatious conduct, **6:11**

PROTECTIVE SERVICES

Abuse, neglect or exploitation of
vulnerable adult, powers and
duties of protective services, **9:2**

PROTECTORS

Trust Code, **10:25**

**PRUDENT ADMINISTRATION OR
MANAGEMENT**

Protection of persons under disability
and their property, **6:4**
Trust Code, **10:32**

RECORDS

Budgets and sustainability reports,
6:37
Disclaimer of property interests, **8:9**
Protection of persons under disability
and their property, conservator-
ships, **6:36**

REGISTRAR'S DUTY

Probate of wills and administration,
4:10

RENUNCIATION

Non-probate transfers, renunciation
of custodian, **7:18**
Petition to enforce, **4:98**
Right to appointment as personal
representative, **4:74**

REPETITIVE FILINGS

Protection of persons under disability
and their property, **6:12**

REPORTS

Abuse, neglect or exploitation of
vulnerable adult, duty to report,
9:4
Protection of persons under disability
and their property, forms, **6:82**
to **6:85**
Trust Code, **10:36**

RESIGNATION

Non-probate transfers, resignation of
custodian, **7:18**
Protection of persons under disability
and their property, resignation of
guardian, **6:27**
Trust Code, **10:21**

RESTRICTIONS

Disclaimer of property interests, **8:4**

REVOCATION

Health care powers of attorney, **2:4**
Mental health care power of attorney,
2:7
Protection of persons under disability
and their property, powers of
attorney, **6:56**
Trust Code, **10:12**
Will. Intestate Succession and Wills,
this index

RIGHT OF RETAINER

Probate of wills and administration,
4:62

RIGHTS OF BENEFICIARIES

Trust Code, **10:15**

RIGHTS OF CREDITORS

Trust Code, **10:16, 10:17**

RIGHT TO REVOKE OR AMEND

Trust Code, **10:12**

**RULES OF PROCEDURE AND
EVIDENCE**

Trust Code, **10:69**

INDEX

SATISFACTION OF DEVISE DURING LIFE

Intestate succession and wills, rules
of construction, **3:27**

SCOPE OF DISCLAIMER

Disclaimer of property interests, **8:3**

SECURED CLAIMS

Probate of wills and administration,
4:49

SECURITIES

Intestate succession and wills, rules
of construction, **3:23**

SELF-DEALING

Form, exploitation of vulnerable
adult, **9:9**

SETTLORS AND BENEFICIARIES

Trust Code, **10:11 et seq.**

SKILL, DUTY OF

Trust Code, **10:32**

SPECIAL ADMINISTRATOR

Probate of wills and administration,
4:5, 4:31 et seq.

SPECIFIC TRUSTEE POWERS

Trust Code, **10:39**

SPOUSES

Divorce, annulment or legal separa-
tion, effect on intestate succes-
sion and wills, **3:18**

Rights of heirs other than spouse, **3:2**

Rights of spouses, **3:3**

Unprovided for in will, **3:5**

Waiver of rights, **3:4**

SUBSTITUTION

Guardian, **6:27**

SUMMARY ADMINISTRATION

Probate of wills and administration,
4:67

SUPERVISION

Probate of wills and administration,
supervised administration, **4:26**

SUPPORTED DECISION-MAKING AGREEMENT

Background, **6:62**

Generally, **6:63**

SURROGATE HEALTH CARE DECISION MAKERS

Generally, **2:1**

Physician's directives, coordination,
2:11

TAX ELECTIONS

Trust Code, **10:55**

TAX IDENTIFICATION

Trust Code, **10:59**

TAX QUALIFIED DISCLAIMERS

Disclaimer of property interests, **8:8**

TAX RETURNS

Trust Code, **10:62**

THIRD PERSONS

Non-probate transfers, liability to
third persons, **7:17**

Probate of wills and administration,
third-party protection, **4:38,**
4:57

Protection of persons under disability
and their property, third parties
dealing with conservator, **6:43**

Trust Code, **10:27**

TITLING OF ASSETS

Protection of persons under disability
and their property, **6:36**

TRUST CODE

Generally, **10:1 et seq.**

Acceptance, rejection, and resigna-
tion of appointment, **10:19**

Adjustment of income and principal,
10:41

Administration of trust, **10:29, 10:56**
et seq.

Adoption of Code, **10:2**

Animals, trusts for care of, **10:6**

Appointment of successor trustee,
10:22

Appointment powers, **10:54**

Attorneys' fees, **10:75**

Bond, **10:20**

TRUST CODE—Cont'd

Breach of trust, **10:72**
 Charitable trusts, **10:5**
 Commencing and contesting proceedings, **10:70**
 Compensation, **10:24**
 Contested trust matters, **10:74**
 Co-trustees, **10:23**
 Creation of trust, **10:3**
 Cy pres, **10:46**
 Decanting, **10:40**
 Disclaimers, **10:55**
 Distributions, **10:61**
 Duties and powers, generally, **10:28 et seq.**
 Foreign jurisdictions, trusts created in, **10:4**
 Fraud, duress, or undue influence, **10:9**
 Funding of trust, **10:57**
 General trustee powers, **10:38**
 Governing law, **10:58**
 Identification of beneficiary, **10:14**
 Identification of settlor, **10:11**
 Impartiality, **10:31**
 Inform, duty to, **10:34**
 Instrument of trust, **10:10**
 Investment, **10:60**
 Investment duties, **10:37**
 Judicial proceedings, **10:66 et seq.**
 Jurisdiction, **10:67**
 Limitation of actions, **10:73**
 Loyalty, duty of, **10:30**
 Modification and termination, **10:42 et seq.**
 Name change, **10:51**
 Noncharitable trusts without ascertainable beneficiary, **10:7**
 Nonjudicial settlement agreement, **10:53**
 Notification, duty of, **10:35**
 Oral trusts, **10:8**
 Penalty clauses, **10:71**
 Personal liability, **10:26**
 Property of trust, duty to, **10:33**

TRUST CODE—Cont'd

Protectors, **10:25**
 Prudent administration, duty of, **10:32**
 Report, duty to, **10:36**
 Resignation, removal and substitution of trustee, **10:21**
 Rights of beneficiaries, **10:15**
 Rights of creditors, **10:16, 10:17**
 Right to revoke or amend, **10:12**
 Rules of procedure and evidence, **10:69**
 Settlers and beneficiaries, **10:11 et seq.**
 Skill, duty of, **10:32**
 Specific trustee powers, **10:39**
 Tax elections, **10:55**
 Tax identification, **10:59**
 Tax returns, **10:62**
 Third party, protection of, **10:27**

TRUSTEES AND TRUST PROTECTORS

Trust Code, **10:18 et seq.**

VALIDITY OF TRUST

Trust Code, **10:3**

VALUE OF SECURITIES

Rules of construction, increase in value after death, **3:23**

VENUE

Probate of wills and administration, **4:4**
 Protection of persons under disability and their property, **6:2**
 Trust Code, **10:68**

VEXATIOUS CONDUCT

Protection of persons under disability and their property, **6:11**

WAIVER

Intestate succession and wills, rights of spouse, **3:4**
 Probate of wills and administration, formal accounting, **4:89**