

**IN THE CHANCERY (PROBATE) COURT FOR SUMNER COUNTY, TENNESSEE
AT GALLATIN**

FIDUCIARY OATH

IN THE MATTER OF:

DOCKET NO. _____

RESPONDENT

STATE OF TENNESSEE
COUNTY OF SUMNER

I, _____, do hereby solemnly swear or affirm that I will honestly and faithfully perform my duties as the court-appointed fiduciary in this matter as required by law. I understand the needs and preferences of the respondent are important and should be considered. I will treat the respondent with respect. I will not physically, mentally, sexually or financially abuse or exploit the respondent. I will follow the orders of the court. I understand that if an authority is not specifically listed in the court's order, then I cannot make the decision on behalf of the respondent.

I am the fiduciary for the:

- ☐ PROPERTY OF THE RESPONDENT
☐ PERSON OF THE RESPONDENT
☐ PERSON & PROPERTY OF THE RESPONDENT

FOR ALL FIDUCIARIES:

I PROMISE I WILL:

1. Make decisions based upon the best interests of the respondent.
2. Notify the court if my address changes or if the address of the respondent changes.
3. Notify the court if I believe the respondent no longer needs a conservator.
4. File all required reports, including, but not limited to, inventory reports, property management plans, status reports, annual and final accountings, tax returns, corporate security statements, and social security statements of account, on time unless waived by the court.

I PROMISE I WILL NOT:

1. Limit the respondent's communication with others or access to visitors unless specifically authorized to do so by the court.

FOR FIDUCIARIES OF PROPERTY:

I PROMISE I WILL:

1. Open a conservatorship bank account and deposit all income of the respondent into the account.
2. Maintain accurate records. If an accounting is required, I understand I must provide all required financial statements, including, but not limited to, bank statements, investment statements, credit card statements, cancelled checks, invoices, receipts, and tax returns.

I PROMISE I WILL NOT:

1. Spend the respondent's money or use the respondent's property for my benefit or pay myself without court approval.
2. Spend the respondent's money or use the respondent's property for the benefit of someone else without court approval.
3. Make gifts on behalf of the respondent without court approval.
4. Deposit money belonging to anyone other than the respondent into the conservatorship bank account.
5. Borrow money from the respondent, loan the respondent's money to others, or use the respondent's assets to loan money to others.
6. Mortgage or sell the respondent's real property without court approval.
7. Spend more than one thousand dollars (\$1,000) on a single expenditure without express permission granted in a property management plan or other court order.
8. Retitle the respondent's assets into my name.
9. Pay guardian ad litem fees, attorney ad litem fees, attorney fees or fees for professional tax preparation without specific court approval.

Signature of Fiduciary:

Address of Fiduciary:

E-mail & Phone #:

Sworn to and subscribed before me this _____ day of _____, 20_____.

Notary Public/Deputy Clerk

My Commission Expires: _____