

RULE CHANGE 2009 (1)

CHAPTER 27

COLORADO RULES OF PROBATE PROCEDURE

Rule 2. Definitions

As used in these rules, unless the context otherwise requires:

1. "Documents" means any petition, or application, inventory, claim, accounting, notice or demand for notice, motion, and any other writing which is filed with the Court.
2. "Fiduciary" means any personal representative, guardian, conservator, trustee, and special administrator.
3. "Accounting" means any written statement that substantially conforms to CPC form 43JDF 942 for decedents' estates ~~and guardianships, CPC 29 CR, JDF 885~~ for conservatorships ~~or and~~ to the 1984 version of the Uniform Fiduciary Accounting Principles and accompanying Model Account FormatsStandards as recommended by the Committee on National Fiduciary Accounting Standards.
4. "Code" means the "Colorado Probate Code" sections 15-10-101 et seq., C.R.S., as amended.

Rule 31. Accountings

A fiduciary accounting shall contain sufficient information to put ~~the~~ interested partiespersons on notice as to all significant transactions affecting administration during the accounting period.

- a) ~~Any accounting filed~~ All required accountings shall show with reasonable detail the receipts and disbursements for the period covered by the accounting, shall list the assets remaining at the end of the period, and shall describe all other significant transactions affecting administration during the accounting period. Accountings shall be typed or prepared by automated data processing. In any specific case, for good cause shown, the ~~court~~ Court may require the fiduciary to produce such vouchers or other supporting evidence of payment as the court may deem sufficient.
- b) Accountings that substantially conform to CPC Form 43JDF 942 for ~~decedent's estate and guardianships, CPC Form 29 CR~~ decedents' estates, JDF 885 for conservatorships, ~~or and~~ to the 1984 version of the Uniform Fiduciary Accounting Principles and accompanying Model Accounts FormatsStandards as recommended by the Committee on National Fiduciary Accounting ~~standards~~ Standards shall be considered

acceptable as to both content and format for purposes of this rule.

~~Notice of hearing of a petition for approval of an accounting shall be given as required by statute if approval of final accounting is requested, and shall be given as ordered by the court if approval of an interim accounting is requested.~~

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## APPENDIX A TO CHAPTER 27

### COLORADO PROBATE CODE FORMS

(Forms in this Appendix are available from the Colorado courts web page at [http://www.courts.state.co.us/Self\\_Help/Index.cfm](http://www.courts.state.co.us/Self_Help/Index.cfm) .)

The following forms replace current CPC forms:

FORM		REPLACES
JDF 713	Notice to Unborn, Unascertained, Minor or Incapacitated Persons Pursuant to §15-10-403(4)(b), C.R.S	CPC 4
JDF 735	Amended Trust Registration Statement	CPC 38-A
JDF 910	Application for Informal Probate of Will and Informal Appointment of Personal Representative	CPC 11
JDF 913	Order for Informal Probate of Will and Informal Appointment of Personal Representative	CPC 12-T
JDF 915	Letters <input type="checkbox"/> Testamentary <input type="checkbox"/> of Administration	CPC 17
JDF 916	Application for Informal Appointment of Personal Representative	CPC 13-A
JDF 917	Order for Informal Appointment of Personal Representative Replaces	CPC 12-I
JDF 920	Petition for Formal Probate of Will and Formal Appointment of Personal Representative	CPC 9

<b>FORM</b>		<b>REPLACES</b>
JDF 921	Order Admitting Will to Formal Probate and Formal Appointment of Personal Representative	CPC 10
JDF 922	Petition for Adjudication of Intestacy and Formal Appointment of Personal Representative	CPC 13-P
JDF 923	Order of Intestacy, Determination of Heirs and Formal Appointment of Personal Representative	CPC 14
JDF 924	Application for Informal Appointment of Special Administrator	CPC 15-A
JDF 925	Order for Informal Appointment of Special Administrator	CPC 16-A
JDF 926	Petition for Formal Appointment of Special Administrator	CPC 15-P
JDF 927	Order Appointing Special Administrator	CPC 16-P
JDF 941	Decedent's Estate Inventory	CPC 20
JDF 942	Interim/Final Accounting	CPC 43
JDF 943	Notice to Creditors by Publication	CPC 21-A
JDF 944	Notice to Creditors by Mail or Delivery	CPC 21-B
JDF 945	Notice of Disallowance of Claims	CPC 23
JDF 946	Petition for Allowance of Claims	CPC 39-C & CPC 39-PR
JDF 960	Petition for Final Settlement	CPC 24 & CPC 24/25-S & CPC 25H
JDF 962	Notice of Hearing on Petition for Final Settlement	CPC 24-N
JDF 964	Order for Final Settlement	CPC 25

<b>FORM</b>		<b>REPLACES</b>
JDF 965	Statement of Personal Representative Closing Administration	CPC 27
JDF 966	Statement of Personal Representative Closing Small Estate	CPC 28
JDF 990	Petition to Re-Open Estate	CPC 58
JDF 991	Order Re-Opening Estate	CPC 59
JDF 999	Collection of Personal Property by Affidavit	CPC 40

**NEW FORMS**

(NEW) JDF 928 Letters of Special Administrator

**AMENDED FORMS**

(NEW) JDF 863 Letters of Conservatorship - Minor

Amended and Adopted by the Court, En Banc January 8, 2009, effective immediately.

**BY THE COURT:**

Nancy E. Rice  
Justice, Colorado Supreme Court