



**Part I. Fiduciary estate**

**第一部分信托财产**

List the fair market values and balances as of the end date of this reporting period.

列出截至此报告期结束日期的公平市场价值与余额。

**A. REAL ESTATE**

**A. 不动产**

Attach documentation that shows fair market values as of the end of the reporting period (from a state department of assessments and taxation, real estate website or listing, etc.).

附上表明截至报告期结束的公平市场价值的文件（由州评估和税务部门、不动产网站或登记入册等提供）

**Location:** \_\_\_\_\_ **Fair market value:** \$ \_\_\_\_\_  
**位置:** \_\_\_\_\_ **公平市场价值:** \$ \_\_\_\_\_

Address  
地址

\_\_\_\_\_  
City, state, zip  
城市、州、邮政编码

**Lender (if any):** \_\_\_\_\_ **Mortgage balance:** \$ \_\_\_\_\_  
**贷款人（如有）:** \_\_\_\_\_ **住房贷款余额:** \$ \_\_\_\_\_

**Ownership type (select one):**

**所有权类型（选择一项）:**

Sole owner  Joint tenant  Tenant in common with \_\_\_\_\_ % interest

独资业主  联权共有  共同财产所有人占 \_\_\_\_\_ % 的产权

Tenants by the entirety

完全共有

Other (describe):

其他（请说明）: \_\_\_\_\_

<u>Joint tenant/in common/by the entirety/other name</u>	<u>Relationship to minor or disabled person</u>	<u>Address</u>
<u>联权共有/共同财产/完全共 有/其他名义</u>	<u>与未成年人或残疾人的关系</u>	<u>地址</u>

**Location:**  
**位置:**

Fair market value: \$  
公平市场价值: \$

\_\_\_\_\_

Address  
地址

\_\_\_\_\_

City, state, zip  
城市、州、邮政编码

Lender (if any):

Mortgage balance: \$

贷款人 (如有): \_\_\_\_\_ 住房贷款余额: \$ \_\_\_\_\_

Ownership type (select one):

所有权类型 (选择一项):

Sole owner  Joint tenant  Tenant in common with \_\_\_\_\_ % interest

独资业主  联权共有  共同财产所有人占 \_\_\_\_\_ % 的产权

Tenants by the entirety

完全共有

Other (describe):

其他 (请说明): \_\_\_\_\_

Joint tenant/in common/by  
the entirety/other name

Relationship to minor or  
disabled person

Address  
地址

联权共有/共同财产/完全共  
有/其他名义

与未成年人或残疾人的关系

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Location:**  
**位置:**

Fair market value: \$  
公平市场价值: \$

\_\_\_\_\_

Address  
地址

\_\_\_\_\_

City, state, zip  
城市、州、邮政编码

Lender (if any):

Mortgage balance: \$

贷款人 (如有): \_\_\_\_\_ 住房贷款余额: \$ \_\_\_\_\_

Ownership type (select one):

所有权类型 (选择一项):

Sole owner  Joint tenant  Tenant in common with \_\_\_\_\_ % interest

独资业主  联权共有  共同财产所有人占 \_\_\_\_\_ % 的产权

Tenants by the entirety

完全共有

Other (describe):

其他 (请说明): \_\_\_\_\_

<u>Joint tenant/in common/by the entirety/other name</u> 联权共有/共同财产/完全共有/其他名义	<u>Relationship to minor or disabled person</u> 与未成年人或残疾人的关系	<u>Address</u> 地址

**B. CASH & CASH EQUIVALENTS**

**B. 现金与现金等价物**

*Checking, savings, or certificates of deposit (CDs).*

支票、储蓄或定期存单 (CD)。

Attach statements that show balances at the end of the reporting period or the most recent.

附上表明截至报告期结束或最近余额的报表。

<u>Financial institution</u> 金融机构	<u>Type</u> 类型	<u>Account number</u> (last 4 digits only) 账户号码 (仅最后 4 位数)	<u>Balance</u> 余额	<u>Joint owner(s)</u> (if any) 联名账户所有者 (如有)
			\$	
			\$	
			\$	
			\$	
			\$	

**TOTAL: \$**

**合计: \$** \_\_\_\_\_

**C. BROKERAGE ACCOUNTS, STOCKS, BONDS, AND OTHER SECURITIES**

**C. 经纪账户、股票、债券和其他证券**

Attach statements that show values at the end of the reporting period or the most recent.

附上表明截至报告期结束或最近价值的报表。

<u>Name of company</u> 公司名称	<u>Type</u> 类型	<u>Account number</u> (last 4 digits only) 账户号码 (仅最后 4 位数)	<u>Value</u> 价值	<u>Joint owner(s)</u> (if any) 联名账户所有者 (如有)
			\$	
			\$	
			\$	
			\$	
			\$	

**TOTAL: \$**

**合计: \$** \_\_\_\_\_

**D. RETIREMENT ACCOUNTS**

**D. 退休金账户**

IRAs, Roth IRAs, 401(k), 403(b), etc.

IRA、Roth IRA、401(k)、403(b) 等。

Attach statements that show values at the end of the reporting period or the most recent.

附上表明截至报告期结束或最近价值的报表。

<u>Name of company</u> 公司名称	<u>Type</u> 类型	<u>Account number</u> (last 4 digits only) 账户号码 (仅最后 4 位数)	<u>Value</u> 价值	<u>Beneficiary</u> name(s) 受益人姓名
			\$	
			\$	
			\$	
			\$	

**TOTAL: \$**

**合计: \$** \_\_\_\_\_

**E. VEHICLES**

**E. 交通工具**

Cars, boats, off-road vehicles, airplanes, etc.

车、船、越野车、飞机等

Attach valuations for each vehicle as of the end of the reporting period or the most recent.

附上表明截至报告期结束或最近各个交通工具的估值。

<u>Type of vehicle</u> <u>交通工具类型</u>	<u>Year, make, model</u> <u>年份、制造商、型号</u>	<u>Fair Market Value</u> <u>公平市场价值</u>	<u>Lien (if any)</u> <u>留置权 (如有)</u>	<u>Co-owner(s) (if any)</u> <u>共同所有人 (如有)</u>
			\$	
			\$	
			\$	
			\$	

**TOTAL: \$**

**合计: \$** \_\_\_\_\_

**F. PERSONAL PROPERTY**

**F. 个人财产**

List each item with a value over \$2,500 (fine jewelry, artwork, valuable collectables, etc.).

Describe property if the collective value is less than \$2,500. For example, if the total value of the person's property is \$900, do not describe each item or list the value of each piece. Describe it as one category, "furniture."

列出价值超过 \$2500 美元的各项物品（珠宝首饰、艺术品、珍贵的收藏品等）。如果集体价值不足 \$2500 美元，则对财产进行说明。例如，若个人财产总价值为 \$900 美元，请勿说明各项或列出各件物品价值。按类类进行说明，例如“家具”。

If available, attach appraisals or any documents that show values or balances owed at the end of the reporting period or the most recent.

如有，请附上估价单或表明报告期结束或最近欠款或欠款余额的任何文件。

<u>Description</u> <u>说明</u>	<u>Location</u> <u>位置</u>	<u>Value</u> <u>价值</u>	<u>Lien amount (if any)</u> <u>留置权金额 (如有)</u>
			\$
			\$
			\$
			\$
			\$
			\$

**TOTAL: \$**

**合计: \$** \_\_\_\_\_

**G. OTHER**

**G. 其他**

List annuities, burial accounts, burial plots, pre-paid burial plans, college 529 plans, cash values of life insurance policies. Also list judgments, loans, promissory notes, etc., owed to the minor or disabled person.

列出年金、葬礼帐户、墓地、预付葬礼计划、大学 529 计划、人寿保险单的现金价值。另请列出属于未成年人或残疾人的判决、贷款、欠单等。

Attach statements that show values at the end of the reporting period or the most recent. Attach copies of policies or contracts added or changed during the reporting period.

附上表明报告期结束时或最近价值的报表。附上报告期内新增或更改的保单或合同副本。

<u>Name of institution</u> 机构名称	<u>Type of account</u> 账户类型	<u>Account number</u> (last 4 digits only) 账户号码 (仅最后 4 位数)	<u>Value</u> 价值
			\$
			\$
			\$
			\$

**TOTAL: \$**

**合计: \$ \_\_\_\_\_**

**SUMMARY OF THE FIDUCIARY ESTATE:**

**信托财产概述:**

<u>Type</u> 类型	<u>Value reported on last</u> <u>Fiduciary's Account</u> (or Inventory if this is the first account) 上次受托人账户表 报告的价值 (或详细目录 (如果这是首个账目))	<u>Value reported on this</u> <u>Fiduciary Account</u> (enter totals from above) 此次受托人账户表 报告的价值 (输入上文合计金额)
A. Real estate A. 不动产	\$ _____	\$ _____
B. Cash & cash equivalents B. 现金与现金等价物	\$ _____	\$ _____
C. Brokerage accounts, stocks, bonds, and other securities C. 经纪账户、股票、债券和 其他证券	\$ _____	\$ _____
D. Retirement accounts D. 退休金账户	\$ _____	\$ _____
E. Vehicles E. 交通工具	\$ _____	\$ _____
F. Personal Property F. 个人财产	\$ _____	\$ _____
G. Other G. 其他	\$ _____	\$ _____
<b>TOTALS:</b>	\$ _____	\$ _____
<b>合计:</b>	\$ _____	\$ _____

**Part II. Liabilities**

**第二部分负债**

List debts owed, other than mortgage or liens listed above. Attach additional sheets if needed.

列出所欠债务，但上述住房贷款或留置权除外。如有需要请另附页。

**A. LOANS**

**A. 贷款**

Attach account statements, or other documents that show amounts owed as of the end of the reporting period or the most recent.

附上表明截至报告期结束或最近所欠金额的账户报表或其他文件。

<u>Lender name</u> 贷款人姓名	<u>Purpose (loan type)</u> 目的 (贷款类型)	<u>Loan number</u> 贷款编号	<u>Balance due</u> 结欠余额
			\$
			\$
			\$
			\$

**TOTAL: \$**

**合计: \$** \_\_\_\_\_

**B. CREDIT CARDS**

**B. 信用卡**

Attach statements that show balances as of the end of the reporting period or the most recent.

附上表明截至报告期结束或最近余额的报表。

<u>Company</u> 公司	<u>Card</u> 银行卡	<u>Account number</u> (last 4 digits only) 账户号码 (仅最后 4 位数)	<u>Balance due</u> 结欠余额
			\$
			\$
			\$
			\$

**TOTAL: \$**

**合计: \$** \_\_\_\_\_



**C. JUDGMENTS/LIENS**

**C. 判决/留置权**

Attach copies of court orders or other documents that show balances owed as of the end of the reporting period or the most recent.

附上表明截至报告期结束或最近所欠余额的法院命令或其他文件副本。

<u>Description</u> 说明	<u>Balance due</u> 结欠余额
	\$
	\$
	\$
	\$

**TOTAL: \$**

**合计: \$** \_\_\_\_\_

**D. OTHER**

**D. 其他**

List other liabilities such as alimony, child support, garnishments, etc.

列出赡养费、子女抚养费、扣押债权等其他欠债。

Attach copies of documents that show balances owed (if any). Also attach copies of court orders entered or changed during the reporting period.

附上表明所欠余额（如有）的文件副本。另请附上报告期间做出或更改的法院命令副本。

<u>Description</u> 说明	<u>To whom owed</u> 债权人	<u>Balance due</u> 结欠余额
		\$
		\$
		\$

**TOTAL: \$**

**合计: \$** \_\_\_\_\_

**Part III. Income and disbursements**

**第三部分收入和支出**

Attach additional sheets if needed.

如有需要请另附页。

**A. INCOME**

**A. 收入**

List all income, including benefits received (payments from insurance, judgments, loans, promissory notes, etc.) during the reporting period.

列出报告期内收到的所有收入，包括福利（保险、判决、贷款、欠单等提供的付款）。

Attach Social Security statements, Department of Veterans Affairs benefit statements, pay stubs, account statements, court orders, and other documents that show income.

附上社会保障报表、退伍军人事务部福利报表、工资单、账户报表、法院命令和其他表明收入的文件。

<u>Source</u> <u>来源</u>	<u>Total</u> <u>合计</u>
Social Security income: 社会保障收入:	\$ _____
Supplemental Security Income (SSI): 补充保障收入 (SSI):	\$ _____
Social Security Disability Insurance (SSDI): 社会安全残疾保险 (SSDI):	\$ _____
Veterans Affairs benefits: 退伍军人事务福利:	\$ _____
Public cash assistance (e.g., Temporary Cash Assistance (TCA) or Temporary Assistance for Needy Families (TANF)): 公共现金援助（例如临时现金援助 (TCA) 或贫困家庭临时援助 (TANF)）:	\$ _____
Wages: 工资:	\$ _____
Interest: 利息:	\$ _____
Rental income: 租金收入:	\$ _____
Pensions/retirement: 养老金/退休金:	\$ _____
Alimony: 赡养费:	\$ _____
Annuity payments: 年金给付:	\$ _____
Other (refunds, cash receipts, etc.) (describe): 其他（退款、现金收据等）（请说明）:	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

**TOTAL: \$**  
**合计: \$ \_\_\_\_\_**

**B. DISBURSEMENTS**

**B. 支出**

*List payments made from fiduciary accounts.*

*列出受托人账户进行的付款。*

Attach receipts, statements, and other documentation showing payments.

附上收据、报表和表明付款的其他文件。

<u>Date</u> 日期	<u>To whom paid</u> 收款人	<u>Purpose of payment</u> 付款目的	<u>Amount</u> 金额
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$

**TOTAL: \$**  
**合计: \$** \_\_\_\_\_

**TOTAL INCOME AND DISBURSEMENTS:**

**收入与支出合计:**

Total income (total from Part III. A.):	\$ _____
收入合计 (第三部分 A 项合计):	\$ _____
Total disbursements (total from Part III. B.):	-\$ ( _____ )
支出合计 (第三部分 B 项合计):	-\$ ( _____ )
Net income/(loss):	\$ _____
净收入/ (损失):	\$ _____
Cash & cash equivalents balance from Fiduciary's Account (or Inventory if this is the first account):	\$ _____
受托人账户的现金与现金等价物余额 (或详细目录 (如果这是首个账户)):	\$ _____
Ending cash & cash equivalents (total from Part I. B.):	\$ _____
期末现金与现金等价物 (第一部分 B 项合计):	\$ _____

**Part IV. Assets changed or deleted**

**第四部分更改或删除的资产**

*Describe assets (other than brokerage accounts) that changed during the reporting period. For example, if you sold a house, provide the date of the sale, the selling price, where you deposited the proceeds of the sale (e.g., which bank account), and explain why it was sold.*

*说明报告期内更改的资产 (经纪账户除外)。例如若您出售了房屋, 请提供出售日期、售出价格、销售受益存放地 (例如哪个银行账户) 并说明出售原因。*

Attach HUD-1 settlement statements, bills of sale, or other documents that show changes or confirm sales. Attach additional sheets if needed.

附上 HUD-1 结算表、销售单据或表明更改或确认出售的其他文件。如有需要请另附页。

---



---



---



---



---

**Part V. Other**  
**第五部分其他**

**A. HEALTH INSURANCE AND EXPENSES**

**A. 健康保险与开支**

Attach proof of insurance or notices of eligibility.

附上保险证据或资格通知。

<u>Coverage type</u> 保险类型	<u>Provider</u> 保险公司
Medical 医疗	
Dental 牙科	
Vision 视力	
Prescription 处方	
Other: 其他:	

Does the minor or disabled person have or do you anticipate medical expenses the court should know about?  Yes  No

未成年人或残疾人是否有或您预期法院应该知道的医疗开支?  是  否

If yes, explain:

如果是, 请说明:

---

---

---

---

**B. OTHER MATTERS**

**B. 其他事项**

*Describe pending litigation, potential claims, potential inheritances, other public benefits (e.g., food stamps), or other matters of which the court should be aware.*

说明未决诉讼、潜在索赔、潜在遗产、其他公共福利(如粮食券)或法院应知悉的其他事项。

---

---

---

---

**BOND**

**债券**

The fiduciary bond, if any, has been filed in this action in the amount of \$ \_\_\_\_\_ on \_\_\_\_\_ .  
Date

此次诉讼已提交信托债券(如有), 金额为 \_\_\_\_\_ , 提交日期为 \_\_\_\_\_ 。  
日期

Attach a copy of the bond.

附上债券副本。

**PROPOSED FINAL DISTRIBUTION OF REMAINING ASSETS OF THE ESTATE**

**财产中剩余资产的拟议最终分配。**

*For final fiduciary account only. Attach additional sheets if needed.*

**仅针对最终受托人账户。如有需要请另附页。**

The proposed distribution of the estate to be made as of the approximate date of \_\_\_\_\_  
(Date), is as follows:

**截至（日期）前后，拟议的财产分配如下所示：**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**VERIFICATION:**

**查核：**

I solemnly affirm under the penalties of perjury that the contents of this document are true to the best of my knowledge, information, and belief.

**本人郑重确认据本人个人所知所信，此文件内容真实。如有不实甘受伪证罪之罚。**

\_\_\_\_\_  
Date  
日期

\_\_\_\_\_  
Signature of Guardian 1  
监护人 1 签名

\_\_\_\_\_  
Printed Name  
正写姓名

\_\_\_\_\_  
Address  
地址

\_\_\_\_\_  
City, state, zip  
城市、州、邮政编码

\_\_\_\_\_  
Telephone  
电话

This is a new address since the last report (or since appointment if this is your first report).

**这是自上次报告以来（或自被任命以来，如果这是您的首次报告）的新地址。**

---

Date  
日期

---

Signature of Guardian 2 (if applicable)  
监护人 2 签名 (如适用)

---

Printed Name  
正写姓名

---

Address  
地址

---

City, state, zip  
城市、州、邮政编码

---

Telephone  
电话

This is a new address since the last report (or since appointment if this is your first report).

这是自上次报告以来 (或自被任命以来, 如果这是您的首次报告) 的新地址。

---

Name of Fiduciary's Attorney  
受托人律师姓名

---

Address  
地址

---

City, state, zip  
城市、州、邮政编码

---

Fax  
传真

---

Email  
电子邮箱

---

Attorney Number  
(律师编号)

ANFR1; ANFR2; ANFR3; ANFRE