

Conservatorship Accounts

Proper Captioning

Name of Account - The account should be captioned in one of the following manners:

- Joe Doe, Conservator of Mary Doe, a protected individual
- Joe Doe, Conservator of Mary Doe, a minor
- Estate of Mary Doe, John Doe, conservator

The Following Are Not Acceptable:

- Joe Doe AND Mary Doe
- Joe Doe IN TRUST FOR Mary Doe
- Joe Doe ITF Mary Doe
- Joe Doe, Trustee for Mary Doe (unless you were actually appointed Trustee)
- Joe Doe, Custodian for Mary Doe
- Joe Doe, Custodian for Mary Doe under Uniform Gifts to Minors Act (UGMA)