

# **SAMPLE**

General Conservatorship  
(Non-Emergency)

Rev. 5/2/2025

Use this packet to fill out  
your "BLANK" forms.

Do not file or write in this packet.



ATTORNEY NAME: <b>Your Full Legal Name and Co-Conservator (if any)</b> FIRM NAME: _____ STREET ADDRESS: <b>Your Street Address Apt#</b> CITY: <b>City</b> TELEPHONE: <b>State Zip</b> E-MAIL ADDRESS: <b>Phone #</b> ATTORNEY SUPERVISOR: _____ STREET ADDRESS: <b>191 N. First Street</b> MAILING ADDRESS: <b>191 N. First Street</b> CITY AND ZIP CODE: <b>San Jose, CA 95113</b> BRANCH NAME: <b>Probate Courthouse - DTS</b>	COURT USE ONLY  <h1 style="margin: 0;">SAMPLE ONLY</h1> <h2 style="margin: 0;">Do not write on this copy!</h2>
CO-CONSERVATOR (Name): <b>Conservatee's Full Legal Name</b> (PROPOSED) CONSERVATEE	
PETITION FOR APPOINTMENT OF PROBATE CONSERVATOR OF THE <input type="checkbox"/> Limited Conservatorship	CASE NUMBER: <b>Leave Blank</b> HEARING DATE: _____
<input type="checkbox"/> SUCCESSOR <input checked="" type="checkbox"/> PERSON <input type="checkbox"/> ESTATE	

1. Petitioner (Name): **Your Full Legal Name**
- a. (Name): **Your Street Address Apt# Phone #**  
 (Address): **City State Zip**
- be appointed of the PE **Full Legal Name of Co-Conservator (if any)**
- b. (Name): **Your Street Address Apt# Phone #**  
 (Address): **City State Zip**
- be appointed ☐ successor ☐ conservator ☐ limited conservator of the ESTATE of the (proposed) conservatee and Letters issue upon qualification.
- c. (1) ☒ bond not be required ☐ because the proposed ☐ successor conservator is a corporate fiduciary or an exempt government agency. ☒ for the reasons stated in Attachment 1c.
- (2) ☐ bond be fixed at: \$ \_\_\_\_\_ to be furnished by an authorized surety company or as otherwise provided by law. (Specify reasons in Attachment 1c if the amount is different from the minimum required by Probate Code section 2320.)
- (3) ☐ \$ \_\_\_\_\_ in deposits in a blocked account be allowed. Receipts will be filed. (Specify institution and location): \_\_\_\_\_
- d. ☐ orders authorizing independent exercise of powers under Probate Code section 2590 be granted. Granting the proposed ☐ successor conservator of the estate powers to be exercised independently under Probate Code section 2590 would be to the advantage and benefit and in the best interest of the conservatorship estate. (Specify orders, powers, and reasons in Attachment 1d.)
- e. ☐ orders relating to the capacity of the (proposed) conservatee under Probate Code section 1873 or 1901 be granted. (Specify orders, facts, and reasons in Attachment 1e.)
- f. ☐ orders relating to the powers and duties of the proposed ☐ successor conservator of the person under Probate Code sections 2351-2358 be granted. (Specify orders, facts, and reasons in Attachment 1f.)
- g. ☒ the (proposed) conservatee be adjudged to lack the capacity to give informed consent for medical treatment or healing by prayer and that the proposed ☐ successor conservator of the person be granted the powers specified in Probate Code section 2355. (Complete item 9 on page 6.)

Do NOT use this form for a temporary conservatorship.

**Conservatee's Full Legal Name**

CASE

**Leave Blank**

1. h. ☐ (for limited conservatorship only) orders relating to the powers and duties of the proposed limited conservator of the person under Probate Code section 2351.5 be granted. (Specify orders, powers, and duties in Attachment 1h and complete item 1j.) ☐ successor\*
- i. ☐ (for limited conservatorship only) orders relating to the powers and duties of the proposed limited conservator of the estate under Probate Code section 1830(b) be granted. (Specify orders, powers, and duties in Attachment 1i and complete item 1j.) ☐ successor\*
- j. ☐ (for limited conservatorship only) orders limiting the civil and legal rights of the (proposed) limited conservatee be granted. (Specify limitations in Attachment 1j.)
- k. ☐ **Mark "1.k." if the conservatee has Dementia and fill in the correct information.** *ing*
- (Form GC-300) and Dementia Attachment to Capacity Declaration Conservatorship (Form GC-300-1), executed by a licensed physician or by a licensed psychologist acting within the scope of his or her licensure with at least two years experience diagnosing dementia, ☐ are filed herewith. ☐ will be filed before the hearing. ☐ (appointment of successor conservator only) will not be filed because an order relating to dementia placement or treatment was filed on (date): That order has neither expired by its terms nor been revoked.

l. ☐ **Mark "1.l." if there will be a Co-Conservator on this application.**

2. (Proposed) **Conservatee's Full Legal Name Phone #**  
(Present address) **Current Street Address**  
**City, State, Zip**

3. a. ☒ **Jurisdictional facts (initial appointment only)** The proposed conservatee has no conservator in California and is a

(1) ☐ **Mark "3.(1)" if the Conservatee is a resident of California and Santa Clara County**  
**Mark "3.(1)(b)" if they are, but in a different County**

the proposed conservatee for the reasons specified in Attachment 3a.

(2) ☐ **Mark "3.(2)" if the Conservatee does not live in California and mark a box "(a)-(c)" for correct reason**

reasons specified in Attachment 3a.

- b. **Petitioner Answer "3.b.(1)" Does the conservatee owes you money?**

(1) ☐ **Answer "3.b.(2)" Do you owe conservatee money?**

(2) ☐ **Mark "3.b.(3)-(12)" What is your relationship to proposed conservatee?**

(3) ☐ **Mark the correct box that applies (3.b.(1)-(12))**

(4) ☐ *7.)*

(5) ☐

(6) ☐

(7) ☐

(8) ☐

(9) ☐

(10) ☐

(11) ☐

(12) ☐

\* See Item 5b on page 4.



CONSERVATORSHIP OF <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>Conservatee's Full Legal Name</b>  <small>(PROPOSED) CONSERVATEE</small> </div>	CASE # <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>Leave Blank</b> </div>
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3. c.

**"3.c.(1)(8)" - Mark all the boxes that apply to you and your relationship with the conservatee.**

d.

**Leave Blank**

petitioner had with the (proposed) conservatee or his or her family and friends.

e.

**Leave Blank**

f.

☐

(1)

**Mark "3.f.(1)" if you are asking to waive service on the any of the conservatee's relatives. You must attach an additional sheet of paper to explain why you cannot find them. Ask staff for help with this.**

(2)

are contained on Attachment B(2).

CONSERVATORSHIP OF (n) <b>Conservatee's Full Legal Name</b> (PROPOSED) CONSERVATEE	CASE NUMBER <b>Leave Blank</b>
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3. g. So far as known to Petitioner, a conservatorship or equivalent proceeding concerning the proposed conservatee
- ☐ has not ☐ has been filed in another jurisdiction concerning the proposed conservatee, including a court of an Indian tribe with jurisdiction (see Prob. Code, § 2031(b)).

(If you answered "has," identify the jurisdiction and state the date the case was filed):

4. (Proposed) conservatee

- a. ☐ is ☐ is not **Answer this question** of the California Department of State **Answer this question** (tution):

- b. ☐ is receiving or e **Answer this question** benefits from the U.S.

- c. ☐ is ☐ is not so far as is known to petitioner, a member of a federally recognized Indian tribe  
(If you answered "is,"

(If you answered "is,"

(1) Name of tribe:

(2) Location of tribe (if the tribe is located in more than one state, the state that is the tribe's principal location):

(3) The proposed con

(4) So far as known to

**Answer this question**

tribal land.

5. a. ☒ Proposed conservatee (initial appointment of conservator only)

(1) ☒ is an adult.

(2) ☐ will be an adult on the effective date of the order (date):

(3) ☐ is a married minor.

(4) ☐ is a minor whose marriage has been dissolved.

- b. ☐ Vacancy in office of conservator (appointment of successor conservator only. A petition for appointment of a limited conservator after the death of a predecessor is a petition for initial appointment. (Prob. Code, § 1860.5(a)(1).)

There is a vacancy in the office of conservator of the ☐ person ☐ estate for the reasons

☐ specified in Attachment 5b. ☐ specified below.

\* "Tribal land" is land that is, with respect to a specific Indian tribe and the members of that tribe, "Indian country", as defined in 18 U.S.C. § 1151.

## CASE

~~(PROPOSED) CONSERVATEE~~

- Describe in detail the mental and/or physical health impairments and diagnosis of the person you want to conserve.**

(2)

**Conservatee's Full Legal Name**

CASE

**Leave Blank**

5. d. ☐ (Proposed) conservatee voluntarily requests the appointment of a ☐ successor conservator.  
*(Specify facts showing good cause in Attachment 5(d).)*
- e. ☒ Confidential Supplemental Information (form GC-312) is filed with this petition. *(Initial appointment of conservator only. All petitioners must file this form except banks and other entities authorized to do business as a trust company.)*
- f. (Proposed) conservatee ☐ is ☒ is not developmentally disabled as defined in Probate Code section 1420. Petitioner is aware of the requirements of Probate Code section 1827.5. *(Specify the nature and degree of the alleged disability in Attachment 5f).*

6. **Mark "6." If you or co-conservator are married to the conservatee and answer all the questions that apply**

*(if you checked item 6b(1) or (2) or both, specify the facts and reasons in Attachment 6b.)*

7. **Mark "7." If you or co-conservator is a domestic partner or former domestic partner of the conservatee answer all the questions that apply**

8. **Leave Blank**

9. **That order has neither expired by its terms nor been revoked.**

- d. **Answer this question.**

**Conservatee's Full Legal Name**

CASE NO.

**Leave Blank**

10. ☐ **Temporary conservatorship** Check this box if you are asking for a temporary conservatorship.

Filed with this petition is a *Petition for Appointment of Temporary Conservator* (form GC-111).

**11. (Proposed) conservatee's relatives**

The names, residence addresses, and relationships of the spouse or registered domestic partner and the second-degree relatives of the (proposed) conservatee (his or her parents, grandparents, children, grandchildren, and brothers and sisters), so far as known to petitioner, are

- a. ☒ listed below.  
 b. ☐ not known, or no longer living, so the (proposed) conservatee's deemed relatives under Probate Code section 1821(b) (1)-(4) are listed below.

Name and relationship to conservatee

Residence address

(1)	<p><b>Fill in all the requested relatives of the conservatee.</b></p>
(2)	
(3)	
(4)	
(5)	
(6)	<p><b>Maternal Grandfather's Name:</b> _____ <b>Maternal Grandfather's Address:</b> _____</p>
(7)	<p><b>Maternal Grandmother's Name:</b> _____ <b>Maternal Grandmother's Address:</b> _____</p>
(8)	<p><b>Fill in a spot for each child or step child(ren) the conservatee has, if any.</b></p>
(9)	<p><b>Fill in a spot for each brother(s) or sister(s) the conservatee has, if any.</b></p>
(10)	<p><b>Fill in a spot for any Step Fathers, Step Mothers, Step Grandparents, Step Brother(s)/</b></p>
(11)	<p><b>Sister(s) the conservatee has, if any.</b></p>
(12)	
(13)	
(14)	
(15)	<p>If you need room for more names, mark this and add a blank sheet and label it, "Attachment 11".</p>
(16)	



Continued on Attachment 11.

**Conservatee's Full Legal Name**

CASE

**Leave Blank**

(PROPOSED) CONSERVATEE

12. ☐ **Confidential conservator screening form**

Submitted with this petition is a *Confidential Conservator Screening Form* (form GC-314) completed and signed by the proposed ☐ successor conservator. *(Required for all proposed conservators except banks and trust companies.)*

13. ☐ **Court investigator**

Filed with this petition is a

**# pages attached to this form or "0" if none**

14. Number of pages attached:

Date:

**Leave Blank**

*(All petitioners must also sign (Prob. Code, § 1020; Cal. Rules of Court, rule 7.103).)*

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

**Today's Date**

Date

**Print Your Name**

(TYPE OR PRINT NAME OF PETITIONER)

**Sign Your Name**

(SIGNATURE OF PETITIONER)

**Co-Conservator Prints Name**

(TYPE OR PRINT NAME OF PETITIONER)

**Co-Conservator Signs Name**

(SIGNATURE OF PETITIONER)

C	<b>Conservatee's Full Legal Name</b>	<b>Leave Blank</b>
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**ATTACHMENT (Number) : 1c**

*(This Attachment may be used with any Judicial Council form.)*

**Page 1 of 1**

*(Add pages as required)*

**THIS IS**

**Leave Blank**

*(If the item that this Attachment concerns is made under penalty of perjury, all statements in this Attachment are made under penalty of perjury.)*





The next 2 attachments:

(MC-025) Attachment 1I

If there are two or more proposed conservators filling out this application, you must fill out this attachment.

GC-313 Dementia Attachment

If the person you are conserving has been diagnosed with Dementia, you must fill out this attachment.



<b>Conservatee's Full Legal Name</b>	CASE NO. <b>Leave Blank</b>
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ATTACHMENT (Number): 11

(This Attachment may be used with any Judicial Council form.)

# If you are the only conservator, remove this attachment.

1. Petitioner to represent Co-conservator shall not be required to document pursuant to the conservatorship conservators

2. Petitioner's resignation of conservatorship remains in place

(If the item that this Attachment concerns is made under penalty of perjury, all statements in this Attachment are made under penalty of perjury.)

Page \_\_\_\_ of \_\_\_\_

(Add pages as required)



CONSERVATORSHIP OF (Name):

CASE NUMBER:

Conservatee's Full Legal Name

Leave Blank

**ATTACHMENT REQUESTING SPECIAL ORDERS REGARDING DEMENTIA**  
**(Petition for Exclusive Authority to Give Consent for Medical Treatment (form GC-380))**  
**(Petition for Appointment of Probate Conservator (form GC-310))**

## 1. Petitioner requests:

- a. ☐ to place the conservatee in a nursing home. Code section 8700.02, subdivision (a)(1).
- b. ☐ to authorize the conservatee to be placed in a nursing home.

2. The conservatee does not have *Mental Disorders*.

## 3. A medical declaration with at least two years has been filed.

- a. ☐ has been filed.
- b. ☐ will be filed.

4. ☐ *Restricted placement* lacks capacity appropriate to the conservatee's condition.5. ☐ *Dementia medication* dementia. The conservatee has been prescribed dementia medication.

**Remove this attachment if the  
 Conservatee does not have  
 Dementia.**

**If they do, you must fill out  
 this form.**



<p>ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, Office, Address, City, State, Zip, Phone Number)</p> <p><b>Your Legal Full Legal Name and Co-Conservator (if any)</b></p> <hr/> <p><b>Your Street Address</b>      <b>Apt#</b>      <b>CA</b>      _____  <b>City</b>      _____ (Zip)  <b>State</b>    <b>Zip</b>  <b>Phone #</b></p>	<p>FOR COURT USE ONLY</p> <p style="font-size: 24pt; font-weight: bold;">SAMPLE ONLY</p> <p style="font-size: 18pt; font-weight: bold;">Do not write on this copy!</p>
<p>SUPERIOR COURT OF CALIFORNIA, COUNTY OF Santa Clara</p> <p>STREET ADDRESS: <b>191 N. First Street</b>  MAILING ADDRESS: <b>191 N. First Street</b>  CITY AND ZIP CODE: <b>San Jose, CA 95113</b>  BRANCH NAME: <b>Probate Courthouse - DTS</b></p>	
<p><input type="checkbox"/> GUARDIANSHIP    <input checked="" type="checkbox"/> CONSERVATORSHIP    OF THE    <input checked="" type="checkbox"/> PERSON    <input type="checkbox"/> ESTATE</p> <p>OF (Name) <b>Conservatee's Full Legal Name</b></p> <p style="text-align: right;"><input type="checkbox"/> MINOR    <input checked="" type="checkbox"/> (PROPOSED) CONSERVATEE</p>	
<p><b>NOTICE OF HEARING - GUARDIANSHIP OR CONSERVATORSHIP</b></p>	<p>CA <b>Leave Blank</b></p>

This notice is required by law.

This notice does not require you to appear in court, but you may attend the hearing if you wish.

1. NOTICE is given that (name) : **Your Legal Full Legal Name and Co-Conservator (if any)**  
(representative capacity, if any) .

Leave Blank

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<input checked="" type="checkbox"/> OF	<b>Conservatee's Full Legal Name</b>	<input type="checkbox"/> E	<input type="checkbox"/> C	<b>Leave Blank</b>
	<input checked="" type="checkbox"/> MINOR	<input type="checkbox"/> (PROPOSED) CONSERVATEE		

A copy of this *Notice of Hearing* has a right under the law to be served. Copies of this Notice may be served personally served on certain persons, guardianships and conservatorships, **either service by mail or personal service** allows. The petitioner does this which the petitioner then files with the court.

This page contains a proof of service. The person who performs the service must complete this page and attach it to this Notice when it is filed.

**You have to find an adult (18 or older) to mail a set of this Notice of Hearing (non-confidential) forms onto the following Conservatee's Relatives:**

**Mom      Sister(s)      Maternal Grandparents      All Children**  
**Dad      Brother(s)      Paternal Grandparents      Spouse**  
**(including all "Step" above relatives too)**

\* (This Note replaces the clerk's form GC-020(C), Clerk's Certificate of Service)

**The server (not you) must fill out their complete address and date, print and sign their name below.**

- I am over the age of 18 and not a party to this case.
- My residence or business address is (specify) :

**Server's Street Address**  
**City, State, Zip**
- I served the foregoing *Notice of Hearing-Guardianship or Conservatorship* on each person named below by enclosing a copy in an envelope addressed as shown below AND
  - ☒ **depositing** the sealed envelope with the United States Postal Service on the date and at the place shown in item 4 with the postage fully prepaid.
  - ☐ **placing** the envelope for collection and mailing on the date and at the place shown in item 4 following our ordinary business practices. I am readily familiar with this business's practice for collecting and processing correspondence for mailing. On the same day that correspondence is placed for collection and mailing, it is deposited in the ordinary course of business with the United States Postal Service in a sealed envelope with postage fully prepaid.
- Date mailed:
  - Place mailed (city, state) :
- ☒ I served with the *Notice of Hearing-Guardianship or Conservatorship* a copy of the petition or other document referred to in the Notice.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: **Date Server Signs**

<b>Server Prints Name</b> <small>(TYPE OR PRINT NAME OF PERSON COMPLETING THIS FORM)</small>	<b>Server Signs Name</b> <small>(SIGNATURE OF PERSON COMPLETING THIS FORM)</small>
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**NAME AND ADDRESS OF EACH PERSON TO WHOM NOTICE WAS MAILED**

	Name of person served	Address (number, street, city, state, and zip code)
1.	<b>List names and addresses of proposed conservatee's living relatives here.</b>	
2.		
3.		
4.		

☐ Continued on an attachment. (You may use form DE-120(MA)/GC-020(MA) to show additional persons served.)



CONSERVATORSHIP OF THE <input checked="" type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (Name) <span style="border: 1px solid black; padding: 5px; display: inline-block; width: 500px; height: 30px; vertical-align: middle;"><b>Conservatee's Full Legal Name</b></span> <div style="text-align: right; font-size: small;">CONSERVATEE</div>	CASE NUMBER: <div style="border: 1px solid black; padding: 5px; text-align: center; height: 30px; font-size: large;"><b>Leave Blank</b></div>
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**ATTACHMENT TO NOTICE OF CONSERVATEE'S RIGHTS***(This attachment is for use with Form GC-341.)***NAME AND ADDRESS OF EACH PERSON TO WHOM NOTICE WAS MAILED**

Name and relationship  
to conservatee

Address (number, street, city, state, and zip code)

**Additional page to list more names and addresses of  
 proposed conservatee's living relatives here, if needed.**



GC-320 Citation for Conservatorship

This form is to be served onto  
the person you want to  
conserve.



<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>Your Full Legal Name and Co-Conservator (if any)</b> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 40%;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>Your Street Address      Apt#</b> </div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>City</b> </div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>State   Zip</b> </div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>Phone #</b> </div> </div> <div style="width: 55%;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>ZIP CODE:</b> </div> </div> </div>		<b>FOR COURT USE ONLY</b>  <div style="font-size: 24pt; font-weight: bold; margin: 10px 0;">SAMPLE ONLY</div> <div style="font-size: 18pt; font-weight: bold; margin: 10px 0;">Do not write on this copy!</div>
<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF Santa Clara</b> </div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>STREET ADDRESS: 191 N. First Street</b> </div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>MAILING ADDRESS: 191 N. First Street</b> </div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>CITY AND ZIP CODE: San Jose, CA 95113</b> </div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>BRANCH NAME: Probate Courthouse - DTS</b> </div>		
<div style="display: flex; justify-content: space-between;"> <div style="width: 40%;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>Conservatee's Full Legal Name</b> </div> </div> <div style="width: 55%; text-align: center;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>PROPOSED CONSERVATOR</b> </div> </div> </div>		
<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>CITATION FOR CONSERVATORSHIP</b> </div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <input type="checkbox"/> Limited Conservatorship         </div>		<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> <b>Leave Blank</b> </div>

THE PEOPLE OF THE STATE OF CALIFORNIA

To (name):

1. You are hereby cited and required to appear at a hearing in this court on

a. Date: **Leave Blank**

b. Address:

and to

☒ unwhy the following person should not be appointed ☒ conservator ☐ limited conservator or your ☒ person☐ estate (name):**Your Full Legal Name and Co-Conservator (if any)**

2. A conservatorship of the person may be created for a person who is unable properly to provide for his or her personal needs for physical health, food, clothing or shelter. A conservatorship of the property (estate) may be created for a person who is unable to resist fraud or undue influence, or who is substantially unable to manage his or her own financial resources. "Substantial inability" may not be proved solely by isolated incidents of negligence or improvidence.
3. At the hearing a conservator may be appointed for your ☒ person ☐ estate.  
The appointment may affect or transfer to the conservator your right to contract, to manage and control your property, to give informed consent for medical treatment, to fix your place of residence, and to marry.
4. You may be disqualified from voting if you are found to be incapable of communicating, with or without reasonable accommodations, a desire to participate in the voting process. You will not be disqualified from voting on the basis that you do, or would need to do, any of the following to complete an affidavit of voter registration:
- Sign the affidavit of voter registration with a mark or a cross, pursuant to Section 2150(b) of the Elections Code;
  - Sign the affidavit of voter registration by means of a signature stamp pursuant to Section 354.5 of the Elections Code;
  - Complete the affidavit of voter registration with the assistance of another person pursuant to Section 2150(d) of the Elections Code; or
  - Complete the affidavit of voter registration with reasonable accommodations.
5. The judge or the court investigator will explain to you the nature, purpose, and effect of the proceedings and answer questions concerning the explanation.

**CONTINUED ON PAGE 2. THE CLERK'S SEAL IS ALSO ON THAT PAGE.**

CONSERVATORSHIP OF THE <input checked="" type="checkbox"/> PERSON <input type="checkbox"/> ESTATE of <div style="border: 1px solid black; padding: 5px; display: inline-block; width: 90%;"> <b>Conservatee's Full Legal Name</b> </div>	CASE NUMBER <div style="border: 1px solid black; padding: 5px; display: inline-block; width: 90%;"> <b>Leave Blank</b> </div>
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6.

7.

Leave Blank

Date:

(SEAL)



CONS of (na <span style="float: right;"><b>Conservatee's Full Legal Name</b></span>	CAS <span style="float: right;"><b>Leave Blank</b></span>
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**PROOF OF SERVICE**

1. At the time of service I was at least 18 years of age and not a party to this proceeding. I served copies of the *Citation for Conservatorship* and the *Petition for Appointment of Probate Conservator* (form GC-310) as follows:

2. a. Person cited (name):

**Conservatee's Full Legal Name**

b. Person served: (1) ☒ person in item 2a

(2) ☐ other (specify name and title or relationship to the person named in item 2a) :

c. Address (specify) :

**Conservatee's Street Address**

**City, State, Zip**

3. I served the person named in item 2

a. ☒ by personally delivering the copies (1)

**Date Server Served**

**Time Server Served**

b. ☐ by mailing the copies to the person served, first-class mail, postage prepaid,

(1) on (date):

(2) from (city):

(3) ☐ with two copies of the *Notice and Acknowledgment of Receipt - Civil* and a postage-paid return envelope addressed to me. (Attach completed *Notice and Acknowledgment of Receipt - Civil* (form POS-015).)

(4) ☐ to an address outside California with return receipt requested. (Attach completed return receipt.)

c. ☐ other (specify other manner of service, and the authorizing code section and order of the court) :

4. a. Person serving (name, address, and telephone number):

**Server's Name**  
**Server's Street Address**  
**City, State, Zip**

(Zip)

b. ☐ Fee for service: \$

c. ☒ Not a registered California process server.

d. ☐ Exempt from registration under Business and Professions Code section 22350(b).

e. ☐ Registered California process server.

(1) ☐ Employee or independent contractor.

(2) Registration no. (specify):

(3) County (specify):

(4) Expiration (date):

5. ☒ I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

6. ☐ I am a California sheriff or marshal and I certify that the foregoing is true and correct.

Date:

**Date Server Signs**

**Server Signs Name**

(SIGNATURE OF PERSON SERVING)





(GC-335) Capacity Declaration

This form is filled out by the proposed conservatee's doctor.

Bring this form with you to your court hearing.



Your Full Legal Name and Co-Conservator (if any)

FOR COURT USE ONLY

Your Street Address Apt#

City

CA

(Zip)

State Zip

Phone #

**SAMPLE  
ONLY**

**Do not write  
on this copy!**

SUPERIOR COURT OF CALIFORNIA, COUNTY OF Santa Clara

STREET ADDRESS: 191 N. First Street

MAILING ADDRESS: 191 N. First Street

CITY AND ZIP CODE: San Jose, CA 95113

BRANCH NAME: Probate Courthouse - DTS

CONSERVATORSHIP OF THE ☒ PERSON ☐ ESTATE OF (Name)

Conservatee's Full Legal Name

☐ CONSERVATEE ☒ PROPOSED CONSERVATEE

CAPACITY DECLARATION-CONSERVATORSHIP

CASE

Leave Blank

## TO PHYSICIAN, PSYCHOLOGIST, OR RELIGIOUS HEALING PRACTITIONER

The purpose of this form is to enable the court to determine whether the (proposed) conservatee (check all that apply) :

- A. ☒ is able to attend a court hearing to determine whether a conservator should be appointed to care for him or her. The court hearing is set for (date) : . (Complete item 5, sign, and file page 1 of this form.)
- B. ☒ has the capacity to give informed consent to medical treatment. (Complete items 6 through 8, sign page 3, and file pages 1 through 3 of this form.)
- C. ☐ has ☐ or the ☐ of this form

Mark "C." if the conservatee has Dementia.

(If more than one item is checked above, sign the last applicable page of this form or form GC-335A if item C is checked. File page 1 through the last applicable page of this form; also file form GC-335A if item C is checked.)

COMPLETE ITEMS 1-4 OF THIS FORM IN ALL CASES.

1.

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5.

Leave Blank. The Conservatee's Doctor will fill this out this 3 page form.

I de  
Dat

## Leave Blank

**Note to practitioner:** This form is **not** a rating scale. It is intended to assist you in recording your *impressions* of the (proposed)

C.

**Leave Blank. The Conservatee's Doctor will fill this out.**

(Continued on next page)

**Conservatee's Full Legal Name**

**Leave Blank**

**Leave Blank. The Conservatee's Doctor will fill this out.**



CONSERVATORSHIP OF THE ☒ PERSON ☐ ESTATE OF (NAME)

Conservatee's Full Legal Name

CASE

Leave Blank

ATTACHMENT TO FORM GC-335, CAPACITY DECLARATION-CONSERVATORSHIP,

**This form is only to be attached  
if the Conservatee has Dementia.  
If not, remove this form.**

**Leave Blank. The Conservatee's Doctor  
will fill this form out.**





The next 3 attachments:

(GC-340) Order Appointing Probate Conservator

The Order is signed by the judge at the court hearing if they agree you should be conservator.

(MC-025) Attachment 29 & 3i

If there are two or more proposed conservators filling out this application, you must fill out this attachment.

(GC-350) Letters of Conservatorship

If this order is approved, this form explains what you are authorized to do as a conservator. This form makes the order legal if signed by the judge.



<p>AT NA FIR STR CIT TEL E-M AT</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <b>Your Full Legal Name and Co-Conservator (if any)</b> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <b>Your Street Address      Apt#</b> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <b>City</b> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <b>State   Zip</b> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <b>Phone #</b> </div> <p><b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF Santa Clara</b></p> <p>STREET ADDRESS: <b>191 N. First Street</b></p> <p>MAILING ADDRESS: <b>191 N. First Street</b></p> <p>CITY AND ZIP CODE: <b>San Jose, CA 95113</b></p> <p>BRANCH NAME: <b>Probate Courthouse - DTS</b></p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <b>Conservatee's Full Legal Name</b> </div> <p><b>ORDER APPOINTING</b>   <input type="checkbox"/> <b>SUCCESSOR</b>  <b>PROBATE CONSERVATOR OF THE</b>   <input checked="" type="checkbox"/> <b>PERSON</b>   <input type="checkbox"/> <b>ESTATE</b>  <input type="checkbox"/> <b>Limited Conservatorship</b></p>	<p><small>FOR COURT USE ONLY</small></p> <p style="font-size: 2em; font-weight: bold;">SAMPLE ONLY</p> <p style="font-size: 1.5em; font-weight: bold;">Do not write on this copy!</p>
<p><b>WARNING: THIS APPOINTMENT IS NOT EFFECTIVE UNTIL LETTERS HAVE ISSUED.</b></p>	

1. The petition for appointment of ☐ successor conservator came on for hearing as follows  
*(check boxes c, d, e, and f or g to indicate personal presence):*

a. Judicial officer (name):

b. Hearing date: \_\_\_\_\_ Time: \_\_\_\_\_

c. ☒ **Your Full Legal Name and Co-Conservator (if any)**

d. ☐ Attorney for petitioner (name):

☐ Room:

Leave Blank

TH

2.

3. Granting the conservatorship is the least restrictive alternative needed for the protection of the conservatee.

4. (Name): **Conservatee's Full Legal Name**

a. ☒ is unable properly to provide for his or her personal needs for physical health, food, clothing, or shelter.

Leave Blank

Do not use this form for a temporary conservatorship.

Page 1 of 2

**Conservatee's Full Legal Name**

CASE

**Leave Blank**

CONSERVATEE

9. ☐   
 10. ☐   
 11. ☐   
 12. ☐ **Leave Blank**   
 13. ☐   
 14. ☐   
 15. ☐

License no.:

Issuance or last renewal date:

Expiration date:

16. (Either a, b, or c must be checked):

- a. ☐ The ☐ suc  
 b. ☐ The ☐ suc  
 against the co  
 c. ☐ The ☐ suc  
 against the co  
 It is in the bes

**Answer "16. a.", "b.", or "c."**

17. (Either a, b, or c must be checked):

- a. ☐ The ☐ suc  
 b. ☐ The ☐ suc  
 intends to term  
 c. ☐ The ☐ suc  
 to terminate or  
 domestic partn

**Answer "17. a.", "b.", or "c."**

THE COURT ORDERS:

18. a. **Your Full Legal Name and Co-Conservator (if any) Phone #**

(Address)

**Your Street Address**

**Apt#**

**City**

is appo

**State Zip**

Conservator of the PERSON of (name):

s of Conservatorship shall issue upon qualification.

b. (Name)

(Address)

**Leave Blank**

is ap

19. ☐ The

20. a. ☒ b. ☐ c. ☐

b. ☐ c. ☐

c. ☐

tion.

vided by law.

location):

CONSERVATORSHIP OF ( <div>Conservatee's Full Legal Name</div> ) CONSERVATEE	CASE NO. <div>Leave Blank</div>
---	------------------------------------

20. (cont.)  
d. ☐ The ☐ successor conservator is not authorized to take possession of money or any other property

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Date

GC

Leave Blank



<b>Conservatee's Full Legal Name</b>	<b>Leave Blank</b>
--------------------------------------	--------------------

CASE NUMBER

ATTACHMENT (Number): 29

(This Attachment may be used with any Judicial Council form.)

1. The sign  
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the conserva  
conservators

2. The Con  
Co-Conserva

If you are the only  
conservator, remove this  
attachment.

(If the item that this Attachment concerns is made under penalty of perjury, all statements in this Attachment are made under penalty of perjury.)

Page \_\_\_\_ of \_\_\_\_

(Add pages as required)





**Your Full Legal Name and Co-Conservator (if any)**

**Your Street Address**      **Apt#**  
**City**  
**State**   **Zip**  
**Phone #**

ATTORNEY FOR (name): **Self-Represented**

SUPERIOR COURT OF CALIFORNIA, COUNTY OF **Santa Clara**  
 STREET ADDRESS: **191 N. First Street**  
 MAILING ADDRESS: **191 N. First Street**  
 CITY AND ZIP CODE: **San Jose, CA 95113**  
 BRANCH NAME: **Probate Courthouse - DTS**

FOR RECORDER'S USE ONLY

**Conservatee's Full Legal Name**

CASE **Leave Blank**

**LETTERS OF CONSERVATORSHIP**

☒ **Person**    ☐ **Estate**    ☐ **Limited Conservatorship**

FOR COURT USE ONLY

**SAMPLE  
ONLY  
Do not write  
on this copy!**

1. ☒ **Your Full Legal Name and Co-Conservator (if any)**

2. ☐ **Conservatee's Full Legal Name**

the person of a married minor) (Name):

was appointed the guardian of the ☐ person ☐ estate by order dated  
 (specify): and is now the conservator of the ☐ person

☐ estate of (name):

3. ☒ Other powers have been granted or conditions imposed as follows:

a. ☒ Exclusive authority to give consent for and to require the conservatee to receive medical treatment that the conservator in good faith based on medical advice determines to be necessary even if the conservatee objects, subject to the limitations stated in Probate Code section 2356.

(1) ☐ This treatment shall be performed by an accredited practitioner of the religion whose tenets and practices call for reliance on prayer alone for healing of which the conservatee was an adherent prior to the establishment of the conservatorship.

b. ☐ **Mark "3.b." if you would like authority to place the conservatee in a care/nursing facility.**

c. ☐ **Mark "3.c." if you would like authority to be in charge of medications appropriate for care and treatment of Dementia.**

restrictions, conditions, and limitations).

e. ☐ Conditions relating to the care and custody of property under Probate Code section 2402 are specified in Attachment 3e.

f. ☐ Conditions relating to the care, treatment, education, and welfare of the conservatee under Probate Code section 2358 are specified in Attachment 3f.

g. ☐ (For limited conservatorship only) Powers of the limited conservator of the person under Probate Code section 2351.5 are specified in Attachment 3g.

h. ☐ (For limited conservatorship only) Powers of the limited conservator of the estate under Probate Code section 1830(b) are specified in Attachment 3h.

i. ☐ **Mark "3.i." if there is more than one Conservator and you want the Conservatorship to continue even if one of the conservators becomes unable to fulfill duties of the Conservatorship.**

(SEAL)

WITNESS, clerk of the court, with seal of the court affixed.

Date:

Clerk, by \_\_\_\_\_, Deputy

Page 1 of 2

This form may be recorded as notice of the establishment of a conservatorship of the estate as provided in Probate Code §1875.

CONSERVATORSHIP OF (name):

CASE NUMBER:

Conservatee's Full Legal Name

Leave Blank

CONSERVATEE

**NOTICE TO INSTITUTIONS AND FINANCIAL INSTITUTIONS**  
(Probate Code sections 2890-2893)

When these *Letters of Conservatorship* (1 letters) are delivered to you as an employee or other representative of an *institution* or *financial institution*, you must deliver them to the conservator or any person acting on behalf of the conservator, or to the conservator's officer or agent, or to the court.

There is a separate form, *Notice of Institution of Proceedings*, which must be filed with the court. The conservator must also file a *Notice of Institution of Proceedings* with the court. If the conservator is a financial institution, the conservator must also file a *Notice of Institution of Proceedings* with the court. The conservator must also file a *Notice of Institution of Proceedings* with the court. The conservator must also file a *Notice of Institution of Proceedings* with the court.

**Read this information.**

The conservator must also file a *Notice of Institution of Proceedings* with the court. The conservator must also file a *Notice of Institution of Proceedings* with the court. The conservator must also file a *Notice of Institution of Proceedings* with the court. The conservator must also file a *Notice of Institution of Proceedings* with the court. The conservator must also file a *Notice of Institution of Proceedings* with the court.

An *institution* is a person or entity that is not a natural person. An *institution* may be a corporation, partnership, or other entity. An *institution* may be a bank, trust, or other entity. An *institution* may be a bank, trust, or other entity. An *institution* may be a bank, trust, or other entity. An *institution* may be a bank, trust, or other entity.

A *financial institution* is a bank, trust, or other entity that is not a natural person. A *financial institution* may be a bank, trust, or other entity. A *financial institution* may be a bank, trust, or other entity. A *financial institution* may be a bank, trust, or other entity. A *financial institution* may be a bank, trust, or other entity.

**LETTERS OF CONSERVATORSHIP**

**AFFIRMATION**

I solemnly affirm that I will perform according to law the duties of ☒ conservator ☐ limited conservator.

Executed on **Today's Date**, at (place): **San Jose, CA**

\_\_\_\_\_  
Print Your Name      ▶      Sign Your Name

\_\_\_\_\_  
Co-Conservator Prints Name      ▶      Co-Conservator Signs Name

**CERTIFICATION**

I certify that this document, including any attachments, is a correct copy of the original on file in my office, and that the Letters issued to the person appointed above have not been revoked, annulled, or set aside, and are still in full force and effect.

(SEAL)

Date: \_\_\_\_\_, Deputy

Clerk, by \_\_\_\_\_

Conservatorship of:

Conservatee's First and Last Name

CASE NUMBER:

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ATTACHMENT (Number): 3i

(This Attachment may be used with any Judicial Council form.)

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**If you are the only  
conservator, remove this  
attachment.**

(If the item that this Attachment concerns is made under penalty of perjury, all statements in this Attachment are made under penalty of perjury.)

Page \_\_\_\_ of \_\_\_\_  
(Add pages as required)



## The next attachment:

### (GC-341) Notice of Conservatee's Rights

This form and the "GC-340 Order Appointing Probate Conservator" will be served by mail on all the following people:

- ☐ conservatee
- ☐ spouse (domestic partner);
- ☐ parents;
- ☐ children (12 years or older)
- ☐ maternal/paternal grandparents;
- ☐ grandchildren (12 years or older)
- ☐ brothers/sisters (half and/or step)

If there is no spouse (domestic partner) or 2nd degree relative of the conservatee, see Page 4, to see a list of people you will need to serve instead.



ATTN: <b>Your Full Legal Name and Co-Conservator (if any)</b>		<b>FOR COURT USE ONLY</b>  <b>SAMPLE ONLY</b> <b>Do not write on this copy!</b>	
<b>Your Street Address Apt#</b> <b>City</b> <b>State Zip</b> <b>Phone #</b>			<b>CA</b> _____ (Zip)
SUPERIOR COURT OF CALIFORNIA, COUNTY OF <b>SANTA CLARA</b> STREET ADDRESS: <b>191 NORTH FIRST STREET</b> MAILING ADDRESS: <b>191 NORTH FIRST STREET</b> CITY AND ZIP CODE: <b>SAN JOSE, CA 95113</b> BRANCH NAME: <b>PROBATE</b>			
OF	<b>Conservatee's Full Legal Name</b> _____ CONSERVATEE		
<b>NOTICE OF CONSERVATEE'S RIGHTS</b>		CAS <b>Leave Blank</b>	

When a person becomes a conservatee, he or she does not necessarily lose the right to take part in important decisions affecting his or her property and way of life. Every conservatee has the right to be treated with understanding and respect and to have his or her wishes considered. Every conservatee has all basic human rights and the right to be well cared for by his or her conservator.

The conservatee has the right to ask questions and to express concerns and complaints about the conservatorship and the actions of his or her conservator. The conservatee may ask the court to review the conservator's management of the conservatorship if disputes cannot be worked out between them. Even if the conservatee does not take direct action, the court will periodically send a person, called a **court investigator**, to visit the conservatee, to inquire about his or her circumstances and desires, and to advise the conservatee of his or her rights. The court also may appoint a lawyer to represent the conservatee.

The conservatee will be allowed the greatest degree of freedom and privacy possible consistent with the underlying reasons for the conservatorship. The conservator should give as much regard to the wishes of the conservatee as possible under the circumstances so that the conservatee may function at the highest level his or her ability permits. The conservator must give due regard to the preferences of the conservatee and to encourage the conservatee's participation in decision-making.

### THE CONSERVATEE'S RIGHTS

After appointment of a conservator, the conservatee keeps the right to:

- Be represented by a lawyer;
- Ask a judge to replace the conservator;
- Ask a judge to end the conservatorship;
- Make or change his or her will;
- Directly receive and control his or her salary; and
- Control an allowance (an allowance is personal spending money the court has authorized the conservator to pay directly to the conservatee).

(Conservatee's rights continued on next page)

Page 1 of 4

CONSERVATORSHIP OF THE <input checked="" type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (Name) <span style="border: 1px solid black; padding: 5px; display: inline-block; width: 500px; height: 20px; vertical-align: middle;">Conservatee's Full Legal Name</span>		CASE NUMBER: <span style="border: 1px solid black; padding: 5px; display: inline-block; width: 200px; height: 20px; vertical-align: middle;">Leave Blank</span>
---	--	---

### THE CONSERVATEE'S RIGHTS (continued)

Unless the court has limited or taken the right away, the conservatee also keeps the right to:

- Receive personal mail;
- Vote;
- Marry or enter into a registered domestic partnership;
- Receive visits from family and friends;
- Make his or her own medical decisions;
- Enter into transactions, to the extent reasonable to (1) provide the necessities of life to the conservatee and his or her minor children, and (2) provide the necessities of life to his or her spouse or basic living expenses to his or her registered domestic partner;
- Engage in other activities the court expressly allows him or her to do, at the time of the conservator's appointment, or a later time following a court hearing on a request for authority to engage in the activity; and
- If the conservatee is a **limited conservatee**, to engage in any activity that the court has not expressly reserved to his or the **limited conservator**.

(Proof of mailing on page 3)  
(Instructions for mailing on page 4)



CONSERVATORSHIP OF THE ☒ PERSON ☐ ESTATE OF

**Conservatee's Full Legal Name**

**Leave Blank**

CONSERVATEE

### PROOF OF MAILING

1. I am over the age of 18. I am the appointed conservator of the above-named conservatee, the conservator's attorney, or an employee of the conservator's attorney. I am a resident of or employed in the county where the mailing occurred.
2. My residence or business address is (specify): **Your Street Address**  
**City, State, Zip**
3. I mailed the foregoing *Notice of Conservatee's Rights* as shown below AND
  - a. ☒ **depositing** the sealed envelope on the date and at the place shown in item 4 with the United States Postal Service with the postage fully prepaid.
  - b. ☐ **placing** the envelope for collection and mailing on the date and at the place shown in item 4 following our ordinary business practices. I am readily familiar with this business's practice for collecting and processing correspondence for mailing. On the same day that correspondence is placed for collection and mailing, it is deposited in the ordinary course of business with the United States Postal Service in a sealed envelope with postage fully prepaid.
4. a. Date mailed: **Date YOU mailed** b. Place mailed (city, state): **Place YOU mailed**
5. Each copy of the *Notice of Conservatee's Rights* was mailed with an attached conformed copy, showing the date of its filing and the judicial officer's signature, of the *Order Appointing Probate Conservator* filed in this matter on (date):

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

D **Today's Date**

**Print YOUR Name**

**Sign YOUR name**

### NAME AND ADDRESS OF EACH PERSON TO WHOM NOTICE WAS MAILED

Name and relationship

Address (number, street, city, state, and zip code)

1. ☐ After you have become Conservator, YOU will have to mail the Notice of Conservatee's Rights and Order Appointing Probate Conservator forms onto the following Conservatee's relatives:  
 Mom    Sister(s)    Maternal Grandparents    All Children  
 Dad    Brother(s)    Paternal Grandparents    Spouse  
 (including all "Step" above relatives too)
2. ☐
3. ☐
4. ☐
5. ☐

**You must fill out their names and complete addresses where you mailed the above forms.**

Rela

Relationship

☐ Continued on an attachment. (You may use form GC-341(MA) to show additional addressees.)

CONSERVATORSHIP OF THE <input checked="" type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (Name) <b>Conservatee's Full Legal Name</b>	CASE NUMBER: <b>Leave Blank</b>
---	---------------------------------

**INSTRUCTIONS FOR MAILING COPIES OF NOTICE OF CONSERVATEE'S  
RIGHTS AND ORDER APPOINTING PROBATE CONSERVATOR**

- What to mail:** The conservator, the conservator's attorney, or the attorney's employee must mail a copy of this *Notice of Conservatee's Rights*, with an attached copy of the *Order Appointing Probate Conservator* showing the judicial officer's signature and the date of filing, to each person identified in item 2 below.
- Who must receive the mailing:** The persons to whom copies of this *Notice of Conservatee's Rights* and the *Order Appointing Probate Conservator* must be mailed are:

- The conservatee;
- The conservatee's attorney, if any;
- The

**Read this section for the instructions for mailing copies of this  
Notice of Conservatee's Rights and Order Appointing Conservator.**

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- Place copies of this *Notice of Conservatee's Rights*, with attached conformed copies of the *Order Appointing Probate Conservator* in sealed envelopes, addressed to each person at the address shown for that person on the Proof of Mailing on page 3 of this form, or on attached additional pages, with postage fully prepaid.
  - Deposit (mail) the sealed envelope(s) with the United States Postal Service on the date and from the place (city and state) shown in item 4 of the Proof of Mailing on page 3 of this form.
- Filing Notice of Conservatee's Rights:** The conservator, or his or her attorney of record, must file with the court the original *Notice of Conservatee's Rights*, with a signed and dated Proof of Mailing and all attached additional address pages. **Do not attach a copy of the *Order Appointing Probate Conservator* to the original *Notice of Conservatee's Rights* filed with the court.**

CONSERVATORSHIP OF THE <input checked="" type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (Name of) <span style="border: 1px solid black; padding: 5px; display: inline-block; width: 500px; height: 30px; vertical-align: middle;"><b>Conservatee's Full Legal Name</b></span> <small>CONSERVATEE</small>	CASE NUMBER: <div style="border: 1px solid black; padding: 10px; text-align: center; width: 100%;"><b>Leave Blank</b></div>
---	--

**ATTACHMENT TO NOTICE OF CONSERVATEE'S RIGHTS***(This attachment is for use with Form GC-341.)***NAME AND ADDRESS OF EACH PERSON TO WHOM NOTICE WAS MAILED**

Name and relationship  
to conservatee

Address (number, street, city, state, and zip code)

	<b>Maternal Grandfather's Address:</b>
--	--

**Additional page to list more names and addresses  
of proposed conservatee's living relatives here, if needed.**



The next attachment:

(GC-348) Duties of Conservator

Read and sign the "Duties of  
Conservator" after you have received  
the handbook from the court.



AT <b>Your Full Legal Name and Co-Conservator (if any)</b>		FOR COURT USE ONLY	
Your Street Address      Apt#		CA      (Zip)	
City		STATE	
State      Zip		E-	
Phone #		AT	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF <b>Santa Clara</b> STREET ADDRESS: <b>191 N. First Street</b> MAILING ADDRESS: <b>191 N. First Street</b> CITY AND ZIP CODE: <b>San Jose, CA 95113</b> BRANCH NAME: <b>Probate Courthouse - DTS</b>			
CONSERVATORSHIP OF THE <input checked="" type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (N) <b>Conservatee's Full Legal Name</b>			
DUTIES OF CONSERVATOR and Acknowledgment of Receipt of <i>Handbook for Conservators</i>		CA <b>Leave Blank</b>	

**SAMPLE  
ONLY  
Do not write  
on this copy!**

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form

I.

**Read this information before  
signing the bottom of this form**

II.

III.

CO <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>Conservatee's Full Legal Name</b> </div>	CAS <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>Leave Blank</b> </div>
--	---

- III. A. 1. An evaluation of the level of care existing when the petition for your appointment as a conservator was filed and the

**Read this information before  
signing the bottom of this form**

B



CO

Conservatee's Full Legal Name

CASE

Leave Blank

CONSERVATEE

## III. C. PROVIDE MEDICAL CARE FOR THE CONSERVATEE

**Read this information before  
signing the bottom of this form**

## IV. C

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CO- _____ <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>Conservatee's Full Legal Name</b> </div>	CASE _____ <div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>Leave Blank</b> </div>
--	---

**IV. A. 5. Claims against others on behalf of the conservatee**

Pursue claims against others on behalf of the conservatee's estate when it is in the best interests of the conservatee or his

**Read this information before  
signing the bottom of this form**

C

Conservatee's Full Legal Name

CAS

Leave Blank

CONSERVATEE

**IV. A. 14. Property, casualty, and liability insurance**

Determine the appropriate kinds and adequate levels of property, casualty, and liability insurance covering the property, ~~assets, risks, and potential liabilities of the conservatee and his or her estate. Maintain the insurance in force during the~~

B. IN

1.

2.

3.

C. R

1.

**Read this information before  
signing the bottom of this form**

COMPLETION OF THIS FORM

Conservatee's Full Legal Name

CASE

Leave Blank

**IV. C. 2. Court review of your accountings and records**

You must file with the court a report with each of your accountings that shows the current circumstances of the conservatee and the estate, along with a petition requesting that the court review and approve the accounting. Your first

V.

**Read this information before  
signing the bottom of this form**

VI.

VII.

CO

Conservatee's Full Legal Name

CASE

Leave Blank

CONSERVATEE

## VIII. JUDICIAL COUNCIL FORMS

This form identifies a number of Judicial Council forms used for court filings in conservatorship proceedings. This form, the

**Read this information before  
signing the bottom of this form**

signing and filing with the court, and they may also be saved to your computer and completed in more than one sitting. Go to the "Forms and Information" page at the Web site's Self-Help Center for more information on accessing the forms.

**ACKNOWLEDGMENT OF RECEIPT  
of *Duties of Conservator* and *Handbook for Conservators*  
(Probate Code, § 1834)**

I acknowledge that I have received this statement of the duties and liabilities of the office of conservator, the *Duties of Conservator* (form GC-348), and the *Handbook for Conservators* adopted by the Judicial Council.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Da

Today's Date

Print Your Name

(TYPE OR PRINT NAME)

Sign Your Name

(SIGNATURE OF (PROPOSED) CONSERVATOR)

Da

Today's Date

Co-Conservator Prints Name

(TYPE OR PRINT NAME)

Co-Conservator Signs Name

(SIGNATURE OF (PROPOSED) CONSERVATOR)

Date:

(TYPE OR PRINT NAME)

(SIGNATURE OF (PROPOSED) CONSERVATOR)

**NOTICE**

**This statement of duties and liabilities is a summary and is not a complete statement of the law. Your conduct as a conservator is governed by the law itself and not by this summary or by the Judicial Council's *Handbook for Conservators*. When in doubt, consult your attorney.**



# **Confidential Information**

**The following forms are  
CONFIDENTIAL for the  
court and the Department  
of Social Services.**

Since they are private you  
don't have to give copies of  
them to anybody but the  
Court.

**DO NOT SERVE THESE TO ANYONE.**





**SUPERIOR COURT OF CALIFORNIA, COUNTY OF SANTA CLARA**

FOR COURT USE ONLY

COURT ADDRESS: 191 North First Street  
 CITY AND ZIP CODE: San José, California 95113  
 PHONE NUMBER: (408) 882-2761  
 FAX NUMBER: (408) 882-2797  
 BRANCH NAME: Downtown Courthouse - Court Investigator's Division

**SAMPLE  
 ONLY**  
**Do not write  
 on this copy!**

**IN THE MATTER OF THE**

☒ Limited Conservatorship      ☐ Conservatorship

RE: **Conservatee's Full Legal Name**

**CONFIDENTIAL DOCUMENT COVER SHEET  
 (Conservatorship - CSF)**

CAS

**Leave Blank**

**RE: CONSERVATORSHIP:**

The following documents shall be made available only to persons who have been designated by the Court to assist the Court in determining whether a proposed conservator should be appointed.



**Leave Blank**



1. a. Proposed conservatee (name):	[Name of person who you want to conserve]		NG DATE:
b. Date of birth:	[Birthdate of person you want to conserve]		
c. Social security No.:	[Social Security # of person you want to conserve]	DEPT.:	TIME:

2. ☒ UNABLE TO PROVIDE FOR PERSONAL NEEDS\* The following facts support petitioner's allegation that the proposed conservatee is unable to provide properly for his or her needs for physical health, food, clothing, and shelter (specify in detail, enlarging upon the reasons stated in the petition; provide specific examples from the proposed conservatee's daily life showing significant behavior patterns): ☐ Specified in Attachment 2.

**Give examples and be specific.**

CONSERVATORSHIP OF (Name): <div style="border: 1px solid black; padding: 5px; text-align: center; margin-top: 5px;"> <b>Conservatee's Full Legal Name</b> </div>	CASE NUMBER: <div style="border: 1px solid black; padding: 5px; text-align: center; margin-top: 5px;"> <b>Leave Blank</b> </div>
---	---

3. ☐

Leave Blank

ify in  
ly life

4. RESIDENCE ("Residence" means the place usually described as "home"; for example, owned real property or long-term rental.)

a. The proposed conservatee is **located** at (street address, city, state) :

**Conservatee's Current Street Address, City, State, Zip**

b. The proposed conservatee's **residence** is \* ☐ the address in item 4a ☐ other (street address, city, state) :

**Conservatee's Home Street Address, City, State, Zip**

c. **Ability to live in residence\*** The proposed conservatee is

(1) ☐

Mark "4.c.(1) or (2)" (next page) and check the boxes that apply to the conservatee's current living situation

below in item 4c(3)).

\*If this item is not applicable, complete item 8. (Continued on page three)



Conservatee's Full Legal Name

Leave Blank

4. c. (continued)

(2) ☐ Mark "4.c.(1) or (2)" (previous page) and check the boxes that apply to the conservatee's current living situation

facts below in item 4c(3)).

(c) ☐ Other (specify and give supporting facts below in item 4c(3)).

(3) ☒ Supporting facts (specify if required) : ☐ Specified in Attachment 4c.

Explain the facts to support your answers from "4.c.(1) or (2)"

5. ALTERNATIVES TO CONSERVATORSHIP\* Petitioner has considered the following alternatives to conservatorship and found them to be unsuitable or unavailable to the proposed conservatee (specify the alternatives considered and the reason or reasons

Leave Blank

6. SERVICES PROVIDED\* (complete a or b, or both a and b)

a. ☒ During the year before this petition was filed.

(1) health

Mark a box and explain your answer here.

conservatee (explain) :

☐ E

(2) social

Mark a box and explain your answer here.

conservatee (explain) :

☐ E

\*If this item is not applicable, complete item 8. (Continued on page four)

CC  	<b>Conservatee's Full Legal Name</b>	EE	<b>Leave Blank</b>
------------	--------------------------------------	----	--------------------

6. a. (continued)

(3)

**Mark a box and explain your answer here.**

proposed

b. ☐ P

a

re

**Mark a box and explain your answer here.**

☐ estate management  
was filed. Petitioner has no

7. SUPPORTING FACTS (AFFIDAVITS) The information provided above is stated

- |  |   |
|--|---|
| a. Item 1: <input checked="" type="checkbox"/> on petitioner's own knowledge | <input type="checkbox"/> in an affidavit (declaration) by another person attached as Attachment 1a. |
| b. Item 2: <input checked="" type="checkbox"/> on petitioner's own knowledge | <input type="checkbox"/> in an affidavit (declaration) by another person attached as Attachment 2a. |
| c. Item 3: <input type="checkbox"/> on petitioner's own knowledge            | <input type="checkbox"/> in an affidavit (declaration) by another person attached as Attachment 3a. |
| d. Item 4: <input checked="" type="checkbox"/> on petitioner's own knowledge | <input type="checkbox"/> in an affidavit (declaration) by another person attached as Attachment 4a. |
| e. Item 5: <input checked="" type="checkbox"/> on petitioner's own knowledge | <input type="checkbox"/> in an affidavit (declaration) by another person attached as Attachment 5a. |
| f. Item 6: <input checked="" type="checkbox"/> on petitioner's own knowledge | <input type="checkbox"/> in an affidavit (declaration) by another person attached as Attachment 6a. |

8. ITEMS NOT APPLICABLE The following items on this form were not applicable to the proposed conservatee:

- ☐ 2    ☒ 3    ☐ 4b    ☐ 4c    ☐ 5    ☐ 6    (specify reasons each item is not applicable) :  
☐ Reasons specified in Attachment 8.

9. Number of pages attached: \_\_\_\_\_

**DECLARATION**

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: 

Today's Date

Print Your Name

(TYPE OR PRINT NAME)

Sign Your Name

(SIGNATURE OF PETITIONER)

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF SANTA CLARA**

COURT ADDRESS: 191 North First Street  
 CITY AND ZIP CODE: San José, California 95113  
 PHONE NUMBER: (408) 882-2761  
 FAX NUMBER: (408) 882-2797  
 BRANCH NAME: Downtown Courthouse - Court Investigator's Division

FOR COURT USE ONLY

**SAMPLE  
ONLY**  
**Do not write  
on this copy!**

**IN THE MATTER OF THE**

☐ Limited Conservatorship ☒ Conservatorship

RE: **Conservatee's Full Legal Name**

**CONFIDENTIAL DOCUMENT COVER SHEET  
(Conservatorship - CSF)**

CASE

**Leave Blank**

**RE: CONSERVATORSHIP:**

The following documents shall be made available only to persons who have been designated by the Court to assist the Court in determining whether a proposed conservator should be appointed.

☒ **Cal. Rules of Court, Rule 7.1050:** Confidential Conservator Screening Form.

☐ **Other:**





**CONFIDENTIAL (DO NOT ATTACH TO PETITION)**

GC-314

<b>Your Full Legal Name and Co-Conservator (if any)</b>		<b>FOR COURT USE ONLY</b>	
<b>Your Street Address Apt#</b> <b>City</b> <b>CA</b> <b>(Zip)</b> <b>State Zip</b> <b>Phone #</b>		<b>SAMPLE ONLY</b> <b>Do not write on this copy!</b>	
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF Santa Clara</b> STREET ADDRESS: <b>191 N. First Street</b> MAILING ADDRESS: <b>191 N. First Street</b> CITY AND ZIP CODE: <b>San Jose, CA 95113</b> BRANCH NAME: <b>Probate Courthouse - DTS</b>			
<b>Conservatee's Full Legal Name</b>			
<b>CONFIDENTIAL CONSERVATOR SCREENING FORM</b> Conservatorship of <input checked="" type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Limited Conservatorship		CASE NO. <b>Leave Blank</b>	HEARING

The proposed conservator must complete and sign this form. The person requesting appointment of a conservator must submit the completed and signed form to the court with the conservatorship petition. ***This form must remain confidential.***

**How This Form Will Be Used**

This form is **confidential** and will not be a part of the public file in this case. Each proposed conservator must complete and sign a separate copy of this form under rule 7.1050 of the California Rules of Court. The information provided in this form will be used by the court and by the persons and agencies designated by the court to assist the court in determining whether to appoint the proposed conservator as conservator. The proposed conservator **must** respond to each item.

1. a. ☐ **Check the correct boxes and answer questions (1-6). If you answer "yes" to any questions, add a blank sheet of paper to explain.**

2. a. ☐ **EACH proposed conservator must complete their OWN Confidential Screening form.**

3. ☐ I v ☐ by ☐ a

4. a. ☐

b. ☐

5. a. ☐

b. ☐

c. ☐

6. a. ☐

(If

b. Th

(If

c. ☐

(If you checked "I am," explain in Attachment 6.)

Page 1 of 2

<div style="border: 1px solid black; padding: 2px; text-align: center;"> <b>Conservatee's Full Legal Name</b> </div>	<div style="border: 1px solid black; padding: 2px; text-align: center;"> <b>Leave Blank</b> </div>
--	--

7. ☐ I have ☐ I have not filed for bankruptcy protection within the last 10 years. (If you checked "I have," explain in
8. ☐ I "yes" to any questions, add a blank sheet of paper to explain. ave,"
9. ☐ I
10. ☐ I **EACH proposed conservator must complete their OWN Confidential Screening form.**
11. ☐ I
12. ☐ I
13. ☐ I
14. ☐ I
15. ☐ I ase.
16. ☐ I an or
17. ☐ I (f).
18. ☐ I ment and ed.
19. ☐ I s he
20. Do you her? ☐ Yes ☐ No (If you checked "Yes," explain in Attachment 2c and provide the name, address, and telephone number of each social worker, parole officer, or probation officer.)

**DECLARATION**

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: 

Today's Date

Print Your Name

(TYPE OR PRINT NAME OF PROPOSED CONSERVATOR)

Sign Your Name

(SIGNATURE OF PROPOSED CONSERVATOR)\*

\*Each proposed conservator must fill out and file a separate screening form.

<p><small>ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address):</small></p> <p><b>Your Full Legal Name and Co-Conservator (if any)</b></p> <hr/> <p><b>Your Street Address      Apt#      CA      (Zip)</b></p> <p><b>City</b></p> <p><b>State   Zip</b></p> <p><b>Phone #</b></p> <p><small>SUPERIOR COURT OF CALIFORNIA, COUNTY OF SANTA CLARA</small></p> <p>STREET ADDRESS:      191 North First Street</p> <p>MAILING ADDRESS:      191 North First Street</p> <p>CITY AND ZIP CODE:      San Jose, California 95113</p> <p>BRANCH NAME:      Downtown Courthouse - Probate Division</p>	<p><small>FOR COURT USE ONLY</small></p> <p style="font-size: 2em; font-weight: bold;">SAMPLE ONLY</p> <p style="font-size: 1.5em; font-weight: bold;">Do not write on this copy!</p>
<p><small>Conservatorship of (Name):</small></p> <p style="border: 1px solid black; padding: 5px; text-align: center; font-weight: bold;">Conservatee's Full Legal Name</p> <p style="text-align: center;"> <input checked="" type="checkbox"/> Person            <input type="checkbox"/> Estate            <input type="checkbox"/> Limited       </p>	<p>Temp Hrg. _____</p> <p>Perm Hrg. _____</p> <div style="border: 1px solid black; padding: 10px; text-align: center; font-weight: bold; margin-top: 10px;">Leave Blank</div>
REFERRAL FOR COURT INVESTIGATOR - CONSERVATORSHIP	<p>CASE NUM _____</p>

**Note:** A fee may be assessed for Court Investigator Services - See Probate Code § 1851.5

This Referral is being sent to the Probate Investigator's Office for an investigation regarding (check all that apply):

- |   |   |                                      |
|---|---|--------------------------------------|
| <input checked="" type="checkbox"/> Appointment     | <input type="checkbox"/> Accounting/Review    | <input type="checkbox"/> Termination |
| <input checked="" type="checkbox"/> Medical Powers  | <input type="checkbox"/> Dementia Powers      |                                      |
| <input type="checkbox"/> Sale of (former) Residence | <input type="checkbox"/> Substituted Judgment |                                      |

Optional: Check if you included the dementia forms in this packet.

**Information about the (Proposed) CONSERVATEE**

■ **(Proposed) Conservatee's CURRENT address:**

Address:

Phone n

■ **(Proposed)**

Address:

Phone n

■ **Birth Da**

■ **Social S**

■ **Marital S**

■ **Special**

■ **Is (prop**

If yes, L

■ **(Proposed)**

Address:

Phone n

Answer these questions.

and Domestic Partner

**CONFIDENTIAL - DO NOT PUT IN COURT FILE**

Conservatorship of (Name):

**Conservatee's Full Legal Name**

Case number:

**Leave Blank**

Gender:

**Information about the (Proposed) CONSERVATOR**

**All Proposed Conservators must complete the information on this page. If there is more than one proposed conservator, each conservator must complete their own page of this form, *Information about the (PROPOSED) CONSERVATOR*.**

- Answer these questions. This information is about you.
- EACH** proposed conservator must complete their **OWN** page of this form, *Information about the (PROPOSED) CONSERVATOR*.
- **Name:**
  - **Relationship to Conservatee:**
    - ☐ Other (describe):
  - **Home address:**
  - **Home phone:**
  - **Birth Date:**
  - **Social security number:**
  - **Driver's License number:**
  - **Work phone:** **Cell phone:**
  - **(Proposed) Conservator's Attorney (name):**

Address:

Phone number: **Fax number:**

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: **Today's Date****Sign Your Name**

Signature of Proposed Conservator

☐ Information sheet(s) for (number) **Total # of conservators in this Petition** of (proposed) co-conservators is attached.

Mark this box if more than 1  
proposed conservator

**CONFIDENTIAL - DO NOT PUT IN COURT FILE**

Conservatorship of (Name):

**Conservatee's Full Legal Name**

Case Number:

**Leave Blank**

General:

**Information about (Proposed) Conservatee's Relatives & Friends**

List the spouse or registered domestic partner, 1st and 2nd degree relatives (these are parents, children, brothers/sisters, grandparents and grandchildren), neighbors and close friends of the (proposed) conservatee.

- Name:
- Relationship (see list above).
- Home Address
- Home phone

- Name:
- Relationship
- Home Address
- Home phone

- Name:
- Relationship
- Home Address
- Home phone

- Name:
- Relationship
- Home Address
- Home phone

- Name:
- Relationship
- Home Address
- Home phone

- Name:
- Relationship
- Home Address
- Home phone

**CONFIDENTIAL - DO NOT PUT IN COURT FILE**

**REFERRAL FOR COURT INVESTIGATOR - CONSERVATORSHIP**  
(PROBATE - SANTA CLARA COUNTY)

Conservatorship of (Name):

**Conservatee's Full Legal Name**

Case Number:

Gender:

**Leave Blank****Information about (Proposed) Conservatee's Relatives & Friends**

Fill in information for ALL proposed conservatee's relatives and friends  
(see list on previous page).

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

Work phone:

Cell phone:

**CONFIDENTIAL - DO NOT PUT IN COURT FILE**

**REFERRAL FOR COURT INVESTIGATOR - CONSERVATORSHIP**  
(PROBATE - SANTA CLARA COUNTY)

Conservatorship of (Name):

**Conservatee's Full Legal Name**

Case Number:

Gender:

**Leave Blank****Information about OTHER ADULTS (age 18 or older) who reside with the proposed Conservatee**

Fill in information for ALL adults who live with the proposed conservatee.

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

- Name:
- Relationship to conservatee:
- Home Address:
- Home phone:

Work phone:

Cell phone:





## Fee Waiver

If you are low-income, have no income, or can prove that you cannot afford the filing fee - fill out the next forms.



Clerk stamps date here when form is filed.

This form must be used by a guardian or conservator, or by a petitioner for the appointment of a guardian or conservator, to request a waiver of court fees in the guardianship or conservatorship court proceeding or in any other civil action in which the guardian or conservator represents the interests of the ward or conservatee as a plaintiff or defendant.

If the ward or conservatee (including a proposed ward or conservatee if a petition for appointment of a guardian or conservator has been filed but has not yet been decided by the court) directly receives public benefits or is supported by public benefits received by another for their support, is a low-income person, or does not have enough income to pay for their household's basic needs and the court fees, you may use this form to ask the court to waive the court fees. The court may order you to answer questions about the finances of the ward or conservatee. If the court waives the fees, the ward or conservatee, their estate, or someone with a duty to support the ward or conservatee, may still have to pay later if:

- You cannot give the court proof of the ward's or conservatee's eligibility,
- The ward's or conservatee's financial situation improves during this case, or
- You settle the civil case on behalf of the ward or conservatee for \$10,000 or more. The trial court that waives fees will have a lien on any such settlement in the amount of the waived fees and costs. The court may also charge the ward or conservatee, or their estate, any collection costs.

Fill in court name and street address:

Superior Court of California, County of Santa Clara

Street: 191 N. First Street

Mail: 191 N. First Street

San Jose, CA 95113

Fill in case number and name:

C Leave Blank

Conservatee's Full Legal Name

## 1 Your Information (guardian or conservator, or person asking the court to appoint a guardian or conservator):

Name: Your Name

Street: Your Street Address Apt#

City: City State Zip

Phone: \_\_\_\_\_

## 2 Your Lawyer (if you have one): Name: Self-Represented

Firm or Affiliation: \_\_\_\_\_ State Bar No.: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ E-mail: \_\_\_\_\_

a. The lawyer has agreed to advance all or a portion of court fees or costs (check one): Yes ☐ No ☐

b. (If yes, your lawyer must sign here.) Lawyer's signature: \_\_\_\_\_  
 If your lawyer is not providing legal-aid type services based on your or the ward's or conservatee's low income, you may have to go to a hearing to explain why you are asking the court to waive the fees.

## 3 Ward's or Conservatee's Information (file a separate Request for each ward in a multiward case):

Name: Fill in information of person you are trying to conserve. Date of birth (ward only): \_\_\_\_\_

Street: \_\_\_\_\_

City: \_\_\_\_\_

Phone: \_\_\_\_\_

## 4 Ward's or Conservatee's Lawyer, if any: Name: Self-Represented

Firm or Affiliation: LEAVE BLANK State Bar No.: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

City: \_\_\_\_\_ Mail: \_\_\_\_\_

## 5 Ward or Conservatee's Job (job title; if not employed, so state):

Name of employer: Fill in job information of person you are trying to

Employer's address: conserve. Zip: \_\_\_\_\_



**Conservatee's Full Legal Name**

## Leave Blank

Supreme Court, Court  
Appellate Court Fee

**Check the box(es) below that apply to the conservatee  
(person being conserved)**

☐ Check here if you are the **(person being conserved)**  
(If your previous request is reasonably available, please attach it to this form and check here): ☐

a. ☐ The ward or one or both of the ward's parents, or the conservatee or the conservatee's spouse or registered domestic partner, receive (check all that apply):

☐ Supplemental Security Income (SSI)  
☐ IHSS (In-Home Supportive Services)  
☐ County Relief/General Assistance  
☐ Special Supplemental Nutrition Program  
☐ Unemployment Compensation  
*(Names and relationships to ward or com)*

\*\*\*\*\*NOTE\*\*\*\*\*

**If you check 8a, you do NOT have to complete the financial information on the third page of this form.**

(Food Stamps)  
Cal  
nd, and Disabled)  
m)  
*listed above*):

**If you check 8b, you MUST complete items 14, 15 and 16 on the third page only.**

**If you check 8c, you MUST complete every item on the third page.**

b. ☐ The gross monthly income of the ward's **the third page.** (es) is less than the amount listed below. (If you check 8b, this form.)\*

Family Size	Family Income	Family Size				
1	\$2,608.33	3	\$4,441.67	5	\$6,275.00	If more than 6 people at home, add \$916.67 for each extra person.
2	\$3,525.00	4	\$5,358.33	6	\$7,191.67	

c. ☐ The ward's or conservatee's household does not have enough income to pay for its basic needs *and* the court fees. I ask the court to (*check one, and you **must** fill out items 14, 15, 16, 17, and 18 on page 4*):\*

(1) ☐ Waive all court fees and costs.      (2) ☐ Waive some court fees and costs.

(3) ☐ Let the (proposed) guardian or conservator, on behalf of the (proposed) ward or conservatee, make payments over time.

*\* (Do not include income of guardian or conservator living in the household in 8b or 8c or count them in family size in 8b, unless they are a parent of the ward or the spouse or registered domestic partner of the conservatee.)*

**Guardians or petitioners for their appointment must complete items 9 and 10.**

## Source (e.g.

a. Name

Street •

City: \_\_\_\_\_

Phone:

Name \_\_\_\_\_

Street •

City: \_\_\_\_\_

Phone:

Ward's

Support

Payor

Court:

Date of

# LEAVE BLANK

Date of order (if multiple, date of latest): \_\_\_\_\_ Monthly amount: \_\_\_\_\_

Name of (Proposed) Ward or Conservatee:

Conservatee's Full Legal Name

Ca

Leave Blank

Conservators or petitioners for their appointment must complete items 11–13.

11 Conservatee's Estate: ☐ Person only, no estate.

☐ Inventory or petition estimated value:

Est. collection date:

12 Conservatee's Spouse's or Registered Domestic Partner's Information:

Name of conservatee's spouse

Date of marriage or partnership

Street or mailing address:

City:

Name of employer (if none, so

Employer's address:

Fill in information, if applicable.

☐ Spouse ☐ Partner

Year of death):

Phone:

State: Zip:

The conservatee's spouse or partner ☐ is ☐ is not managing, or following appointment of a conservator is planning to manage, some or all of the couple's community property outside the conservatorship estate.

If you selected "is" above: The income, money, and property shown on page 4 ☐ includes ☐ does not include the income and property managed, or expected to be managed, by the spouse/partner outside the estate.

☐ Divorced (date of final judgment or decree):

Court:

Case Number: Support order for conservatee? ☐ No ☐ Yes

Date of support order (if multiple, date of latest): Monthly amount:

13 The Conservatee and Trusts:

The conservatee:

a. ☐ is ☐ is not a trustee or settlor of a trust.

b. ☐ is ☐ is not a beneficiary of a trust.

Answer parts (a) and (b).

If you selected "Is" to complete any of the above statements, identify and provide, in an attachment to this Request, the current address and telephone number of the current trustee(s) of each trust, describe the general terms of and value of each trust and the nature and value of the conservatee's interest in each trust, and the amount(s) and frequency of any distributions to or for the benefit of the conservatee prior to your appointment as conservator of which you are aware. (You may use Judicial Council form MC-025 for this purpose.)

All applicants who checked item 8b or item 8c on page 2 must continue to and follow the instructions for completion of items 14–16 or items 14–18 on page 4, before signing below.

The information I have provided on this form and all attachments about the (proposed) ward or conservatee is true and correct to the best of my information and belief. The information I have provided on this form and all attachments concerning myself is true and correct. I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Today's Date

Date:

Print Your Name

Print your name here

Sign Your Name

Sign here



Conservatee's Full Legal Name

c.

Leave Blank

If you checked 8a on page 2, do not fill out below. If you checked 8b, you **must** answer questions 14–16. If you checked 8c, you **must** answer questions 14–18. If you need more space, attach form MC-025 or attach a sheet of paper, and write "Financial Information" and the ward's or conservatee's name and case number at the top.

- 14** ☐ Check here if the ward's or conservatee's income changes a lot from month to month. If it does, complete the form based on their average income for the past 12 months.

**15 Ward's or Conservatee's Gross Monthly Income**

- a. List the source and amount of **any** income the ward or conservatee gets each month, including: wages or other income from work before deductions, spousal/child support, retirement, social security, disability, unemployment, military basic allowance for quarters (BAQ), veterans payments, dividends, interest, trust income, annuities, net business or rental income, reimbursement for job-related expenses, gambling or lottery winnings, etc.

(1) \_\_\_\_\_ \$ \_\_\_\_\_  
 (2) \_\_\_\_\_ \$ \_\_\_\_\_  
 (3) \_\_\_\_\_ \$ \_\_\_\_\_  
 (4) \_\_\_\_\_ \$ \_\_\_\_\_  
 (5) \_\_\_\_\_ \$ \_\_\_\_\_

b. **Total monthly income:** \$ \_\_\_\_\_

**16 Ward's or Conservatee's Household's Income**

- a. List the income of all other persons living in the ward's or conservatee's home who depend in whole or in part on them for support, or on whom they depend in whole or in part for support.

Name	Age	Relationship	Gross Monthly Income
(1) _____	_____	_____	\$ _____
(2) _____	_____	_____	\$ _____
(3) _____	_____	_____	\$ _____
(4) _____	_____	_____	\$ _____
(5) _____	_____	_____	\$ _____
(6) _____	_____	_____	\$ _____
(7) _____	_____	_____	\$ _____
(8) _____	_____	_____	\$ _____
(9) _____	_____	_____	\$ _____
(10) _____	_____	_____	\$ _____

b. **Total monthly income of persons above:** \$ \_\_\_\_\_

**Total monthly income and**

**household income (15b plus 16b):** \$ \_\_\_\_\_

To list any other facts you want the court to know, such as the (proposed) ward's or conservatee's unusual medical expenses, etc, attach form MC-025 or attach a sheet of paper and write "Financial Information" and the (proposed) ward's or conservatee's name and case number at the top.

Check here if you attach another page. ☐

**Important!** If the ward's or conservatee's financial situation or ability to pay court fees improves, you must notify the court within five days on form FW-010-GC.

**Do not include income of guardian or conservator living in the household in item 16, their money and property in item 17, or their deductions and expenses in item 18 unless they are a parent of the ward or the spouse or registered domestic partner of the conservatee.**

**17 Ward's or Conservatee's Household's Money and Property**

a. Cash \$ \_\_\_\_\_

b. All financial accounts (list bank name and amount):

(1) \_\_\_\_\_ \$ \_\_\_\_\_  
 (2) \_\_\_\_\_ \$ \_\_\_\_\_  
 (3) \_\_\_\_\_ \$ \_\_\_\_\_

c. Cars, boats, and other vehicles

Make / Year	Fair Market Value	How Much You Still Owe
(1) _____	\$ _____	\$ _____
(2) _____	\$ _____	\$ _____
(3) _____	\$ _____	\$ _____

d. Real estate

Address	Fair Market Value	How Much You Still Owe
(1) _____	\$ _____	\$ _____
(2) _____	\$ _____	\$ _____

e. Other personal property (jewelry, furniture, furs, stocks, bonds, etc.):

Describe	Fair Market Value	How Much You Still Owe
(1) _____	\$ _____	\$ _____
(2) _____	\$ _____	\$ _____

**18 Ward's or Conservatee's Household's Monthly Deductions and Expenses**

a. List any payroll deductions and the monthly amount below:

(1) \_\_\_\_\_ \$ \_\_\_\_\_  
 (2) \_\_\_\_\_ \$ \_\_\_\_\_  
 (3) \_\_\_\_\_ \$ \_\_\_\_\_  
 (4) \_\_\_\_\_ \$ \_\_\_\_\_

b. Rent or house payment and maintenance \$ \_\_\_\_\_

c. Food and household supplies \$ \_\_\_\_\_

d. Utilities and telephone \$ \_\_\_\_\_

e. Clothing \$ \_\_\_\_\_

f. Laundry and cleaning \$ \_\_\_\_\_

g. Medical and dental expenses \$ \_\_\_\_\_

h. Insurance (life, health, accident, etc.) \$ \_\_\_\_\_

i. School, child care \$ \_\_\_\_\_

j. Child, spousal support (another marriage) \$ \_\_\_\_\_

k. Transportation, gas, auto repair and insurance \$ \_\_\_\_\_

l. Installment payments (list each below):

Paid to:

(1) \_\_\_\_\_ \$ \_\_\_\_\_  
 (2) \_\_\_\_\_ \$ \_\_\_\_\_  
 (3) \_\_\_\_\_ \$ \_\_\_\_\_

m. Wages/earnings withheld by court order \$ \_\_\_\_\_

n. Any other monthly expenses (list each below).

Paid to:	How Much?
(1) _____	\$ _____
(2) _____	\$ _____
(3) _____	\$ _____

**Total monthly expenses**  
 (add 18a–18n above): \$ \_\_\_\_\_

**FW-003-GC****Order on Court Fee Waiver  
(Superior Court) (Ward or Conservatee)**

Clerk stamps date here when form is filed.

- ① (Proposed) guardian or conservator who asked the court to waive

Name:

**Your Full Legal Name**

St

C

Te

**Your Street Address****Apt#****City****State****Zip**

- ② Lawyer, if person in ① has one:

N

F

S

C

E

**Leave Blank**

ar No: \_\_\_\_\_

p: \_\_\_\_\_

Fill in court name and street address:

**Superior Court of California, County of  
Santa Clara****Street: 191 N. First Street****Mial: 191 N. First Street****San Jose, CA 95113**

- ③ **Conservatee's Full Legal Name**

S

C

T

**Street Address****Apt#****City****State****Zip**

- ④ **Lawyer for (proposed) ward or conservatee, if any:**

N

F

S

C

E

**Leave Blank**

ar No: \_\_\_\_\_

p: \_\_\_\_\_

Fill in case number and name:

**Case Number:****Leave Blank****Case Name:**

- ⑤ A request to waive court fees was filed on (date): \_\_\_\_\_

☐

The court made a previous fee waiver order in this case on (date): \_\_\_\_\_

**Conservatee's Full Legal Name****Leave Blank**N  
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Name of (Proposed) Ward or Conservatee:

**Conservatee's Full Legal Name**

Case Number

**Leave Blank**

**6**

a. (1)

- Reporter's fee for attendance at hearing or trial, if you request that the court provide an official reporter
- Assessment for court investigations under Probate Code section 1513, 1826, or 1851
- Preparing, certifying, copying, and sending the clerk's transcript on appeal

**Leave Blank**





Name of (Proposed) Ward or Conservatee:

Case Number:

**Conservatee's Full Legal Name**

**Leave Blank**

**Warning!** If item c is checked, and you do not go to court on your hearing date, the judge will deny your request to waive court fees, and you will have 10 days to pay the ward's or conservatee's fees. If you miss that deadline, the court cannot process the court papers you filed with your request. If the papers

**Leave Blank**

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**This is a Court Order.**