NAME OF INSTITUTION:
ADDRESS:
CONTACT PERSON:
TITLE: TELEPHONE NO:

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SUPERIOR COURT OF CALIFORNIA, COUNTY OF

STREET ADDRESS:
MAILING ADDRESS:
CITY AND ZIP CODE:
BRANCH NAME:

☐ GUARDIANSHIP ☐ CONSERVATORSHIP OF

(Name):

☐ MINOR ☐ CONSERVATEE

NO FILING FEE

NOTICE OF TAKING POSSESSION OR CONTROL OF AN ASSET OF MINOR OR CONSERVATEE

CASE NUMBER:

NOTE TO INSTITUTION

When a guardian or conservator of the estate of a minor or conservatee takes possession or control of an asset of the minor or conservatee held or controlled by an institution, Probate Code section 2890 requires the institution to file a statement with the court having jurisdiction over the guardianship or conservatorship and identified in the *Letters of Guardianship* or *Letters of Conservatorship*. The statement must contain the information specified below concerning the institution, the minor or conservatee, and the asset. The statement must be on this form and must be signed by an authorized officer of the institution. A single statement may cover all assets of a minor or conservatee held by the institution.

An "institution" is defined in Probate Code section 2890(c) as an insurance company, insurance broker, insurance agent, investment company, investment bank, securities broker-dealer, investment advisor, financial planner, financial advisor, or any other person who takes, holds, or controls an asset subject to a conservatorship or guardianship (other than a financial institution as defined in Probate Code section 2892(b)). "Taking possession or control of an asset" includes changing title to the asset, withdrawing all or any portion of the asset, or transferring all or any portion of the asset from the institution.

1. Personal information
   a. Minor or conservatee *(name):*
   b. Guardian or conservator of the estate *(name):*

2. Institution information
   a. Institution *(name and type):*
   b. Address:

3. Asset information
   a. Account, policy, or other identification number:
   b. Type of asset:
   c. Value or, if it is not known, the estimated value of the asset on the date *Letters of Guardianship* or *Letters of Conservatorship* were issued by the court to the guardian or conservator *(this information must be given to the extent it is routinely provided in statements from the institution to asset owners):*

   ☐ Information on additional assets of the minor or conservatee named above held by the institution is stated in attachment 3.

4. The guardian or conservator presented *Letters of Guardianship* or *Letters of Conservatorship* that identify the guardian or conservator as the guardian or conservator of the estate of the minor or conservatee named above.

5. I am an officer of the institution identified in this statement, and I am authorized to sign this statement on its behalf.

I declare under penalty of perjury under the laws of the State of California that the foregoing, including statements in all attachments, is true and correct.

Date:

▶

(TYPE OR PRINT NAME) (AUTHORIZED SIGNATURE)

Title: Telephone no.:

Form Adopted for Mandatory Use
Judicial Council of California
GC-050 [Rev. January 1, 2009]

NOTICE OF TAKING POSSESSION OR CONTROL OF AN ASSET OF MINOR OR CONSERVATEE
(Probate—Guardianships and Conservatorships)

Probate Code, § 2890;
Cal. Rules of Court, rules 7.1011, 7.1061
www.courtinfo.ca.gov

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