

ATTORNEY OR PARTY WITHOUT ATTORNEY <i>(Name, State Bar number, and address):</i>   TELEPHONE NO.: _____ FAX NO. <i>(Optional)</i> : _____ E-MAIL ADDRESS <i>(Optional)</i> : _____ ATTORNEY FOR <i>(Name)</i> : _____	<b>FOR COURT USE ONLY</b>		
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF</b> STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:			
CONSERVATORSHIP OF <i>(Name):</i> _____  (PROPOSED) CONSERVATEE			
<b>PETITION FOR APPOINTMENT OF <input type="checkbox"/> SUCCESSOR          PROBATE CONSERVATOR OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE</b> <input type="checkbox"/> Limited Conservatorship	CASE NUMBER:  <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:80%; padding: 2px;">HEARING DATE AND TIME:</td> <td style="width:20%; padding: 2px;">DEPT.:</td> </tr> </table>	HEARING DATE AND TIME:	DEPT.:
HEARING DATE AND TIME:	DEPT.:		

1. **Petitioner** *(name):* \_\_\_\_\_ **requests that** \_\_\_\_\_ *(Telephone):* \_\_\_\_\_

a. *(Name):* \_\_\_\_\_ *(Address):* \_\_\_\_\_

**be appointed**  successor  conservator  limited conservator of the PERSON of the (proposed) conservatee and Letters issue upon qualification. *(Telephone):* \_\_\_\_\_

b. *(Name):* \_\_\_\_\_ *(Address):* \_\_\_\_\_

**be appointed**  successor  conservator  limited conservator of the ESTATE of the (proposed) conservatee and Letters issue upon qualification. *(Telephone):* \_\_\_\_\_

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. Page 1 of 7

CONSERVATORSHIP OF (Name): _____ <div style="text-align: right; margin-top: 10px;">CONSERVATEE</div>	CASE NUMBER: _____
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1. h.  (for limited conservatorship only) orders relating to the powers and duties of the proposed  successor \* 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.)
- i.  (for limited conservatorship only) orders relating to the powers and duties of the proposed  successor \* 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.)
- 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.  orders related to dementia placement or treatment as specified in the Attachment Requesting Special Orders Regarding Dementia (form GC-313) under Probate Code section 2356.5 be granted. A Capacity Declaration—Conservatorship (form GC-335) and Dementia Attachment to Capacity Declaration—Conservatorship (form GC-335A), 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.  other orders be granted. (Specify in Attachment 1l.)

2. **(Proposed) conservatee** is (name): \_\_\_\_\_ (Telephone): \_\_\_\_\_  
 (Present address): \_\_\_\_\_

3. a.  **Jurisdictional facts** (initial appointment only): The proposed conservatee has no conservator in California and is a
  - (1)  resident of California and
    - (a)  a resident of this county.
    - (b)  not a resident of this county, but commencement of the conservatorship in this county is in the best interests of the proposed conservatee for the reasons specified in Attachment 3a.
  - (2)  nonresident of California but
    - (a)  is temporarily living in this county, or
    - (b)  has property in this county, or
    - (c)  commencement of the conservatorship in this county is in the best interest of the proposed conservatee for the reasons specified in Attachment 3a.
- b. **Petitioner** (answer items (1) and (2) and check all other items that apply:):
  - (1)  is  is not a **creditor** or an agent of a creditor of the (proposed) conservatee.
  - (2)  is  is not a **debtor** or an agent of a debtor of the (proposed) conservatee.
  - (3)  is the proposed  successor conservator.
  - (4)  is the (proposed) conservatee. (If this item is **not** checked, you must also complete item 3f.)
  - (5)  is the spouse of the (proposed) conservatee. (You must also complete item 6.)
  - (6)  is the domestic partner or former domestic partner of the (proposed) conservatee. (You must also complete item 7.)
  - (7)  is a relative of the (proposed) conservatee as (specify relationship): \_\_\_\_\_
  - (8)  is an interested person or friend of the (proposed) conservatee.
  - (9)  is a state or local public entity, officer, or employee.
  - (10)  is the guardian of the proposed conservatee.
  - (11)  is a bank  other entity authorized to conduct the business of a trust company.
  - (12)  is a professional fiduciary within the meaning of Business and Professions Code section 6501(f) who is licensed by the Professional Fiduciaries Bureau of the Department of Consumer Affairs. Petitioner's license number is provided in item 1 on page 1 of the attached Professional Fiduciary Attachment. (Use form GC-210(A-PF)/GC-310(A-PF) for this attachment. You must also complete item 2 on page 2 of that form and item 3d below.)

\* See Item 5b on page 4.

CONSERVATORSHIP OF (Name):  	CASE NUMBER:  
CONSERVATEE	

3. c. **Proposed**  **successor conservator** is (check all that apply):
- (1)  a nominee. (Affix nomination as Attachment 3c(1).)
  - (2)  the spouse of the (proposed) conservatee. (You must also complete item 6.)
  - (3)  the domestic partner or former domestic partner of the (proposed) conservatee. (You must also complete item 7.)
  - (4)  a relative of the (proposed) conservatee as (specify relationship):
  - (5)  a bank  other entity authorized to conduct the business of a trust company.
  - (6)  a nonprofit charitable corporation that meets the requirements of Probate Code section 2104.
  - (7)  a professional fiduciary, as defined in Business and Professions Code section 6501(f). His or her statement concerning licensure or exemption is provided in item 1 on page 1 of the attached Professional Fiduciary Attachment. (Use form GC-210(A-PF)/GC-310(A-PF) for this attachment.)
  - (8)  other (specify):
- d.  **Engagement and prior relationship with petitioning professional fiduciary** (complete this item if petitioner is licensed by the Professional Fiduciaries Bureau.)
- (1)  Statements of who engaged petitioner, or how petitioner was engaged to file this petition, and a description of any prior relationship petitioner had with the (proposed) conservatee or his or her family or friends, are provided in item 2 on page 2 of the attached Professional Fiduciary Attachment. (Use form GC-210(A-PF)/GC-310(A-PF) for this attachment.)
  - (2)  A petition for appointment of a temporary conservator is filed with this petition. That petition contains statements of who engaged petitioner, how petitioner was engaged to file this petition, and a description of any prior relationship petitioner had with the (proposed) conservatee or his or her family and friends.
- e. **Character and estimated value of the property of the estate** (complete items (1) or (2) and (3), (4), and (5)):
- (1)  (For appointment of successor conservator only, if complete Inventory and Appraisal filed by predecessor):  
 Personal property: \$ \_\_\_\_\_, per Inventory and Appraisal filed in this proceeding on  
 (specify dates of filing of all inventories and appraisals):
  
  - (2)  Estimated value of personal property: \$ \_\_\_\_\_
  - (3) Annual gross income from:
    - (a) real property: \$ \_\_\_\_\_
    - (b) personal property: \$ \_\_\_\_\_
    - (c) pensions: \$ \_\_\_\_\_
    - (d) wages: \$ \_\_\_\_\_
    - (e) public assistance benefits: \$ \_\_\_\_\_
    - (f) other: \$ \_\_\_\_\_
  - (4) **Total** of (1) or (2) and (3): \$ \_\_\_\_\_
  - (5) Real property: \$ \_\_\_\_\_
    - (a)  per Inventory and Appraisal identified in item (1).
    - (b)  estimated value.
- f.  **Due diligence** (complete this item if the (proposed) conservatee is not a petitioner):
- (1) Efforts to find the (proposed) conservatee's relatives or reasons why it is not feasible to contact any of them are described on Attachment 3f(1).
  - (2) Statements of the (proposed) conservatee's preferences concerning the appointment of any (successor) conservator and the appointment of the proposed (successor) conservator or reasons why it is not feasible to ascertain those preferences are contained on Attachment 3f(2).





CONSERVATORSHIP OF (Name):          <div style="text-align: right;">CONSERVATEE</div>	CASE NUMBER:          
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8. **(Proposed) conservatee** (check all that apply):
- a.  will attend the hearing AND  is the petitioner  is not the petitioner AND  has  has not nominated the proposed  successor conservator.
  - b.  (initial appointment of conservator only): is able but unwilling to attend the hearing AND  does  does not wish to contest the establishment of a conservatorship,  does  does not object to the proposed conservator, AND  does  does not prefer that another person act as conservator.
  - c.  (initial appointment of conservator only): is unable to attend the hearing because of medical inability. A *Capacity Declaration—Conservatorship* (form GC-335), executed by a licensed medical practitioner or an accredited religious practitioner  is filed with this petition.  will be filed before the hearing.
  - d.  (initial appointment of conservator only): is not the petitioner, is out of state, and will not attend the hearing.
  - e.  (appointment of successor conservator only): will not attend the hearing.

9.  **Medical treatment of (proposed) conservatee**
- a. There is no form of medical treatment for which the (proposed) conservatee has the capacity to give an informed consent.
  - b. A *Capacity Declaration—Conservatorship* (form GC-335) executed by a licensed physician or by a licensed psychologist acting within the scope of his or her licensure, stating that the (proposed) conservatee lacks the capacity to give informed consent for any form of medical treatment and giving reasons and the factual basis for this conclusion,  is filed with this petition.  will be filed before the hearing.  will not be filed for the reason stated in c.
  - c.  (appointment of successor conservator only) The conservatee's incapacity to consent to any form of medical treatment was determined by order filed in this matter on (date):  
That order has neither expired by its terms nor been revoked.
  - d. (Proposed) conservatee  is  is not an adherent of a religion that relies on prayer alone for healing, as defined in Probate Code section 2355(b).

10.  **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 none are now living, so the (proposed) conservatee's deemed relatives under Probate Code section 1821(b)(1)–(4) are listed below.

	<u>Name and relationship to conservatee</u>	<u>Residence address</u>
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		

CONSERVATORSHIP OF <i>(Name)</i> :          <div style="text-align: right;">CONSERVATEE</div>	CASE NUMBER:          
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11. **(Proposed) conservatee's relatives** *(continued)*

	<u>Name and relationship to conservatee</u>	<u>Residence address</u>
(7)		
(8)		
(9)		
(10)		
(11)		
(12)		
(13)		
(14)		
(15)		

Continued on Attachment 11.

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 proposed *Order Appointing Court Investigator* (form GC-330).

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

Date:

\_\_\_\_\_  
(TYPE OR PRINT NAME OF ATTORNEY FOR PETITIONER)

▶ \_\_\_\_\_  
(SIGNATURE OF ATTORNEY FOR PETITIONER)

*(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.

Date:

\_\_\_\_\_  
(TYPE OR PRINT NAME OF PETITIONER)

▶ \_\_\_\_\_  
(SIGNATURE OF PETITIONER)

\_\_\_\_\_  
(TYPE OR PRINT NAME OF PETITIONER)

▶ \_\_\_\_\_  
(SIGNATURE OF PETITIONER)