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## CLIENT PROFILE – CONSERVATORSHIPS

### **I. Information For Preparing Petition**

#### **A. Petitioner**

Full Name \_\_\_\_\_

Other Names Used \_\_\_\_\_

Home Address \_\_\_\_\_

Home Telephone Number \_\_\_\_\_

Occupation \_\_\_\_\_

Employer \_\_\_\_\_

Work Address \_\_\_\_\_

Work Telephone Number \_\_\_\_\_

Date of Birth \_\_\_\_\_

Social Security Number \_\_\_\_\_

Drivers License - Issuing State and Number \_\_\_\_\_

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Have you filed for bankruptcy protection within the last ten years? \_\_\_\_\_

\_\_\_\_\_

Have you ever been appointed as a Conservator, Executor, or Fiduciary in other proceedings? \_\_\_\_\_

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Period of Residence in California \_\_\_\_\_

Are you a United States Citizen? \_\_\_\_\_

Petitioner's relationship to proposed conservatee \_\_\_\_\_

\_\_\_\_\_

If petitioner is the proposed conservatee's spouse, is petitioner a party to legal separation, dissolution, annulment, or adjudication of nullity of marriage proceedings? \_\_\_\_\_

If petitioner is the proposed conservatee's domestic partner, has petitioner terminated the domestic partnership or does petitioner intend to do so?

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Is petitioner a creditor of the proposed conservatee, i.e., does the proposed conservatee owe the petitioner money? \_\_\_\_\_

\_\_\_\_\_

**B. Proposed Conservatee's Personal and Family Data**

Full Name \_\_\_\_\_

Other Names Used \_\_\_\_\_

Date of Birth \_\_\_\_\_

Social Security Number \_\_\_\_\_

Address during the past five years \_\_\_\_\_

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Permanent address if different from that give above \_\_\_\_\_

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Home Telephone Number \_\_\_\_\_

Physicians' Names, Addresses, and Telephone Numbers

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Is the proposed conservatee a patient in or on leave of absence from a California state institution? If so, give the name and address of the facility

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Is the proposed conservatee receiving benefits from the Veterans Administration? If so, give the address of the office handling the claim and the claim number \_\_\_\_\_

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Is the proposed conservatee developmentally disabled? If so, give the address of the local regional center working with the proposed conservatee

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iii. Siblings of the proposed conservatee's parents, and if none,  
children of the proposed conservatee's parents' siblings

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iv. Children of the proposed conservatee's siblings

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**D. Documents And Other Information**

Bank and Savings and Loan Association Accounts - Name and Address of  
Institution and Branch

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Real Property - Provide copies of deeds if available, otherwise addresses

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Securities - Bring copies of a statement from each brokerage account

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Pension and Retirement Plans \_\_\_\_\_

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Tangible Personal Property (e.g., jewelry, paintings, cars, furniture)

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Insurance Policies (e.g., life, health, disability, long term care, auto)

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Business Interests (partnership agreements, shareholder agreements, bylaws, etc.)

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Property located outside California - Provide copies of deeds if available, otherwise address

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Other Property (e.g., royalties, mineral interests, accounts or notes receivable)

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Trusts of which the proposed conservatee is a beneficiary

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Additional Assets \_\_\_\_\_

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Safe Deposit Boxes - Give name and address of institution and box number, location of safe deposit keys, name and address of any person having access, and describe the contents

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Name, address, and description of claim by others to property held by the proposed conservatee \_\_\_\_\_

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Description of claim by proposed conservatee to property held by another - Give name and address of third party, description of property, and nature of the claim \_\_\_\_\_

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Is the proposed conservatee a party to any contracts? If so, give the name and address of the parties to the contracts, the nature of the contracts, and copies of the contracts if available

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Debts - Give the names and addresses of creditors, the amounts of the indebtedness, the nature of the debts, and whether liability for the debts is admitted or disputed

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What are the proposed conservatee's testamentary plans? Give the names and addresses of those that assisted in the planning

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Has the proposed conservatee made a will? If so, is a copy available and from whom? Who are the beneficiaries?

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Is the proposed conservatee the settler or trustee of any trust?

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Does the proposed conservatee have an attorney? If so, give the name, address, and telephone number of the attorney

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