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**CLIENT QUESTIONNAIRE FOR
CONSERVATORSHIP
[Strictly Confidential]**

Part 1: Information for Preparing Petition

1. Petitioner's personal and family data

Name: _____

Address: _____

Telephone: _____

Social Security Number: _____

Drivers License Number and State: _____

Relationship to proposed conservatee: _____

Date of Birth: _____

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

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

Is petitioner a creditor? Or does the proposed conservatee owe petitioner money?

2. Proposed conservatee's personal and family data

Name (and all variations used): _____

Date of birth: _____

Social Security Number: _____

Employer: _____

Address during the past 5 years: _____

Permanent address and telephone number, if different from that given above:

Will proposed conservatee continue to live there; if not, reason change is proposed:

Physicians' names, addresses, and telephone numbers: _____

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

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

Is proposed conservatee developmentally disabled? If so, give address of local regional center working with the proposed conservatee (on limited conservatorships): _____

3. Information required to identify persons entitled to notice and to give notice of hearing

Name and address of proposed conservatee's spouse or domestic partner:

Names, addresses, telephone numbers and relationships of relatives within second degree (children, parents, grandchildren, grandparents, brothers, sisters):

If no spouse, domestic partner, or second-degree relatives, names, addresses, telephone numbers and relationships of the following:

Spouse or domestic partner of predeceased parent of proposed conservatee:

Children of predeceased spouse of proposed conservatee:

Siblings of proposed conservatee's parents, and if none, children of proposed conservatee's parents' siblings:

Children of proposed conservatee's siblings: _____

Part 2: Information for Administering Conservatorship

4. Documents and other information

Bank and savings and loan association accounts, name and address of institution or branch: _____

Real property (bring deeds if available, otherwise addresses): _____

Securities (a copy of a statement from each brokerage account): _____

Pension and retirement plans: _____

Tangible personal property, *e.g.*, jewelry, paintings, cars, household furniture:

Insurance policies, *e.g.*, life, health, disability, auto:

Business interests (partnership agreements, shareholder agreements, bylaws, etc.):

Property located outside California (deeds if available, otherwise addresses):

Other property, *e.g.*, royalties, mineral interests, accounts or notes receivable:

Jointly held property and Totten trusts. Give special attention to how it will be managed and whether it should be used first or last in supporting the conservatee:

Trusts of which proposed conservatee is beneficiary: _____

Additional assets: _____

Safe-deposit boxes. Give name and address of institution and box number; also, location of safe-deposit keys and name and address of any other person having access; describe contents: _____

Name, address, and description of claim by others to property held by proposed conservatee. Is claim admitted?

Description of claim by proposed conservatee to property held by another, including name and address of third party, description of property, and nature of claim: _____

Is proposed conservatee a party to any contracts? Name and address of other parties to contract, nature of contract, and copy, if available: _____

Debts. Names and addresses of creditors, amount of indebtedness, nature of debts, and whether liability is admitted or disputed: _____

What are proposed conservatee's testamentary plans? Names and addresses of persons who assisted in planning: _____

Has proposed conservatee made a will? Is a copy available? If so, from whom?

Who are the beneficiaries? _____

Is proposed conservatee the settlor or trustee of any trust? _____

Does proposed conservatee have an attorney? If yes, name, address, and telephone number of attorney: _____