

Information about
Proposed Conservator

Full Legal Name _____

Relationship to Proposed Conservatee _____ Years Known _____

Address & Telephone _____

Date of Birth _____ Social Security Number _____

Driver's license number & state _____

Information About Proposed Conservatee

Full Legal Name _____

Date of Birth _____ Social Security Number _____

Address & Telephone _____

Name of Doctor _____

Doctor's address, telephone, fax number _____

Medications _____

Is the proposed Conservatee in or on leave from a state institution? Y / N

Is the proposed Conservatee collecting or eligible to collect VA benefits? Y / N

Is the proposed Conservatee able to complete an affidavit of voter registration? Y / N

Does the proposed Conservatee have any estate planning documents? Y / N (If yes, please provide copies)

Please provide, on the back of this page or on a separate sheet, the names, addresses and relationships (and age, if under 18) of: spouse, grandparents, parents, sisters, brothers, children and grandchildren of the proposed Conservatee (if any are deceased, please give name and indicate that the person is deceased).

Please provide a narrative, with examples, of the reasons that you believe a conservatorship is necessary. Things to include: medical diagnosis and date of diagnosis, any recent changes in condition, activities of daily living that the proposed Conservatee cannot do at all or can only do with assistance, and examples of incidents that show that the proposed Conservatee cannot function without assistance. Give examples for things relating to his/her person (self-care, taking medications, preparing meals, etc.) and things relating to finances (not paying bills, how long someone else has been doing it for him/her, things that happened before that made someone else have to take over, likelihood of undue influence.) If conservatorship is necessary because of privacy (HIPAA) problems, give examples of when that has been a problem.

Character and estimated value of the Proposed Conservatee's property:

Personal Property: \$ _____ Personal property includes:
Real Property: \$ _____ Bank accounts \$ _____
Investments \$ _____
Annual gross income from: _____ Annuities
Real Property \$ _____ IRA
401(k)
other _____
Personal Property \$ _____
Pensions \$ _____
Wages \$ _____
Public Assistance \$ _____
(including social security)