

Client Questionnaire

Please attach additional sheets as needed for additional information or to complete a question below if the space provided is inadequate to answer fully. Please indicate the item number for which the information is being entered on any additional sheets attached. If you need assistance in answering any of the questions, please contact Gayle Carson at 310.769.4783 or gayle@familylegacylaw.com

Part 1: Information for Preparing Petition

1. Petitioner's personal and family data

Name, address, and telephone number: _____

Relationship to proposed conservatee: _____

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? (Does the proposed conservatee owe petitioner money?)

2. Proposed conservatee's personal and family data

Name (and all variations used): _____

Date of birth: _____

Driver's License or ID: State _____ Number _____

Address (es) during the past 5 years:

Permanent address if different from that given above:

Residence and whether proposed conservatee can 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 (:

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

If no spouse, domestic partner, or second-degree relatives, names, addresses, 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:

Are there any other factors that would affect the administration of the conservatorship?
