

CLIENT: _____

Address: _____

Phone _____

Email: _____

What is your relationship to the person who may need a guardianship and conservatorship?

Are you asking to be the Guardian and Conservator? _____

If not, who do you want to be the Guardian and Conservator? _____

RESPONDENT (person who may need a guardian and conservator)

Name: _____

Age: _____

Date of Birth: _____

Phone number: _____

Email address: _____

Address:

Street address (if different): _____

Are you planning to move them to a new place to live (adult family home, skilled nursing facility, assisted living, etc.), and if so, where? _____

Do we need to ask the court for an interpreter, and if so, what language? _____

Why does the person need a guardian and conservator? _____

Does the person have? Durable Power of Attorney _____ Trust _____ Will _____
If yes, please provide a copy

RESPONDENT'S ASSETS:

Real property: \$ _____ Investments: \$ _____ Bank accounts: \$ _____

IRA, etc.: \$ _____ Other (describe): _____ \$ _____

MONTHLY INCOME

SSA: \$ _____ SSI: \$ _____ SSDI: \$ _____ Veteran: \$ _____

Pension, etc. (describe): _____ \$ _____

Wages (employer): _____ \$ _____

Other: _____ \$ _____

PEOPLE IMPORTANT TO THE RESPONDENT

Name	Relationship
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_____	_____
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Address: _____

Phone: _____

Name	Relationship
------	--------------

_____	_____
-------	-------

Address: _____

Phone: _____

Name	Relationship
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_____	_____
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Address: _____

Phone: _____