

Probate Conservatorships of the Person

Self-Help Overview Course

Welcome and Introductions

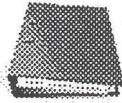
If You Have Questions, Please Feel Free to Ask



Disclaimer of Attorney

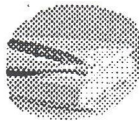
For Attorney Referrals call:
San Bernardino County Bar Association
(909) 885-1986

Probate Conservatorship of the Person Handbook



www.sbt-court.org

Resources



What is a Conservatorship of the Person?

- A legal arrangement where a responsible person takes care for another adult who cannot care for him/herself.
- Need not be a relative.
- Does not manage property.

What is a Conservatorship of the Person? Cont.

- The responsible person is called a Conservator.
- The adult being taken care of is called a Conservatee.

What is a Conservatorship of the Person? Cont.

- A General Conservatorship is set up for adults who cannot take care of themselves.
- A Limited Conservatorship is set up for adults with developmental disabilities.
- Generally, Limited Conservators have less authority than General Conservators.
- LPS Conservatorship – Are initiated by the County Mental Health Department.

What are Court Investigators?

- Court Investigators are court employees who are required to make investigations and determinations of fact for the court.
- You must cooperate with the investigator to ensure they receive the requested information.



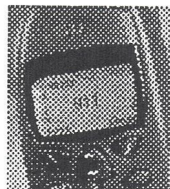
What Will the Court Investigators Do?

- The Court Investigators may conduct a follow up investigation after the Conservatorship is granted.
- The Court may require investigations in addition to those conducted yearly.

What are Court Appointed Attorneys?

- Court appointed Counsel are advocates for the Conservatee only!

Emergency Situations



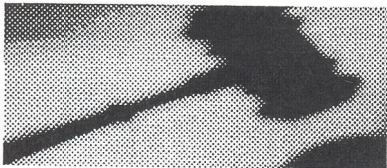
Becoming a Temporary Conservator

- You must use different forms.
- You must also file for a General Conservatorship at the same time.
- Decision on temporary is separate from decision on general.

Is the Conservatorship Process the Same in an Emergency?

- A Temporary Conservatorship can be set up for a short period of time for emergency situations.
- The Temporary Conservator's duties have an expiration date.
- The Court Investigator's report is required after the appointment of the Temporary Conservator and before the hearing for the General Conservatorship.

Starting the Process



How does the process start?

- An agency, relative, or non-relative requests the appointment.
- A lawyer is not required:
 - But a lawyer can be helpful and there may be resources in your community to help you such as the self-help center at your court. Consultation is particularly helpful ahead of time when you make a major decision affecting the quality of life of the Conservatee.

How does the process start? Cont.

- The court looks for good cause.
 - Good Cause is where you prove to the Court there is a need for the appointment of Conservator which is also in the best interest of proposed Conservatee.
- Anyone interested in the proposed Conservatee can object.
 - Anyone interested in the proposed Conservatee may support or object to a petition. This includes spouses, domestic partners, relatives, neighbors and friends.

Is a Conservatorship Needed?

A Conservatorship may not be needed if the proposed Conservatee:

- Voluntarily accepts informal or formal assistance.
- Has planned in advance for incapacity.

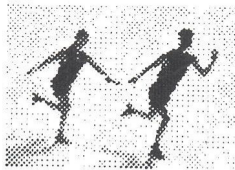
Conservatorship Advantages

- Ensure safety and well being for the Conservatee.
- Stop or prevent abuse.
- Clarify the responsibilities of the Conservator and the rights of the Conservatee.
- Provide stability and order.
- Court supervision and protection.

Conservatorship Disadvantages

- Judicial process can be time consuming and complicated.
- Can be a source of stress and conflict.
- Can be costly.

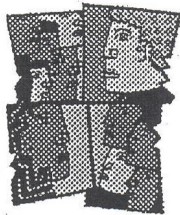
Are You Ready to Become a Conservator?



A Conservator is Responsible for Ensuring Conservatee has:

- Food, Clothing and Shelter
- Safety and Protection
- Personal and Health Care
- Transportation
- Recreation and Emotional Needs

What Questions Should You Ask Yourself?



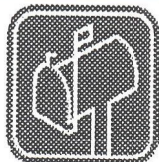
Ask Yourself

- How will the Conservatorship affect you and your family?
- Do you have enough time and resources?
- Are you able to meet your responsibilities as Conservator?
- Can you fulfill your duties to the court?

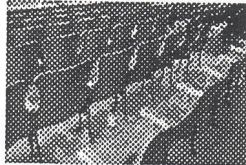


How long does the process take and how much does it cost?





Notice for Probate Conservatorship Hearings



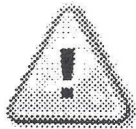
What is Notice?

- Notice is when you tell the Conservatee's family and certain agencies that you asked the court to appoint a Conservator.
- The law tells you who must give notice and to whom it must be given.

How do you give notice?

- Someone – ***Not You*** – gives copies of your court forms to certain people, relatives and agencies.
- There are 2 ways you can give notice:
 - Personal – To the Conservatee Only
 - Mail – All Others

You *MUST* follow the notice rules carefully, or the Hearing will be continued!



How to Get Ready for the Hearing and What Happens?

- Know your forms and bring copies with you, including proof of service, filled-in Order and Letters.
- Cooperate with court investigation.
- Go to the hearing.
- Judge may ask questions.
- Conservatee must attend unless the Court excuses the Conservatee from attending.

Duties & Responsibilities of a Conservator of the Person



What You Must Do?

- Arrange for:
 - Appropriate living situation, including housekeeping
 - Find least restrictive living arrangements, with maximum independence
 - Medical
 - Health
 - Personal Care
 - Meals
 - Clothing
 - Personal items
 - Transportation
 - Entertainment
 - Vacations
 - Work together with the Conservator of the Estate

Hypothesis # 1-End of Life

- The Conservatee has executed an Advanced Health Care Directive (AHCD) expressing his or her wishes regarding end-of-life decisions.
- What is the Conservator's authority?
- A Power of Attorney remains in effect unless revoked by the Court.

Hypothesis # 2-End of Life

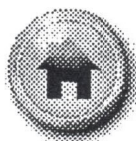
- The Conservatee has no advance care directive and is in an "irreversible" coma.
- What is the Conservator's authority?

Conservatorship Care Plan



Where Should the Conservatee Live?

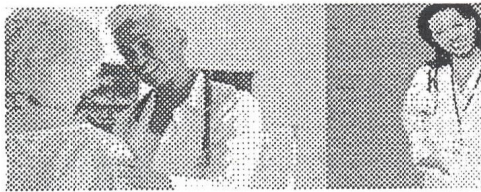
- Home
- Least restrictive and most appropriate home setting.



Different Levels of Care

- Independent Living
- Home Care
- Retirement Community
- Assisted Living
- Board & Care
- Dementia Care
- Intermediate Care
- Skilled Nursing
- Hospice

Health Care Responsibilities



Social Activities

- How should a Conservator handle arranging recreation & social contact?
 - Reading
 - Music
 - Encouraging Contact with Family & Friends
 - Outings & Trips
 - Finding Structured Activities Away from Home

Changing the Conservator

- Resignation of Conservator
- Removal of Conservator
- Death of Conservator
- Lack of Capacity of Conservator

Ending a Conservatorship



When does a Conservatorship End?

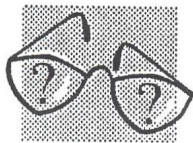
- The Conservatee dies.
 - If Conservatorship of the Estate a Final Accounting must be filed before Conservatorship can end.
- The Court terminates or ends the Conservatorship.

What You Cannot Do?

- Remove the Conservatee from their residence without court approval.
- Place the Conservatee in a secured (locked) facility without court approval.
- Move the Conservatee to another State without court approval.
- Approve sterilization for the Conservatee
- Isolate the Conservatee from friends and family, without good cause.
- Expend funds of the estate without approval of the Conservator of the Estate
- Remove from life support unless the Conservatee previously expressed his/her intent to not receive life support or without court approval.

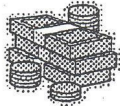
Grounds for Removal

- Negligence
- Failure to perform duties
- Felony conviction
- Gross immorality
- Conflict of interest
- Abandonment of Conservatee



SUPERIOR COURT OF
CALIFORNIA
COUNTY OF SAN BERNARDINO

Conservatorship Training
Conservatorship of the Estate



Session Goals

- Learn the overview of Conservatorship of estate.
- Understand the duties of a Conservator of the estate.
- Conducting Conservatorship affairs.
- Learn what the Court expects of you as Conservator.

**The Process
Pre-appointment**

- Petition is filed and set for hearing.
- Necessary parties are noticed and proof of service filed.
- Court may appoint an attorney for the proposed Conservatee.
- Court Investigator interviews Conservatee and relatives then prepares a written report for the court.

The Appointment Process

- Court appoints a Conservator of the Estate.
- Bond is fixed by the Court.
- Purchase a bond from an insurance carrier.
- Letters of Conservatorship are issued by the Court.

The Process Post-appointment

- Open up a bank account in the name of the Conservatorship.
- File an Inventory and Appraisal within 90 days of appointment.
- Serve the Inventory and Appraisal upon interested parties as well as a Notice of How to Object to the Inventory.
- First accounting is due one year after the date of appointment. Subsequent accountings are due every two years or as otherwise ordered by the Judge.

Forms you will need

- Inventory and Appraisal (Judicial Council form GC-040/GC-041)
- Notice of Filing Inventory and How to Object (GC-042)
- Change of Residence Notice (GC-080)
- Accounting forms (GC-400 et seq)

Bond Amount

- Value of personal property, plus
- Income from all sources for one year, plus
- Bond recovery costs as prescribed in California Rules of Court 7.207. For example, 10% of the estate up to \$500,000.
- If bond becomes insufficient, the Conservator has a duty to inform the court and request a sufficient amount for bond.
- Alternative to reduce bond: Blocked Accounts by Order of the Court.

Calculating the Bond

Example Assets:

Cash	\$	277.60
Checking Account		2,435.67
Savings Account		26,454.23
Check from IRS		4,100.00
Right to Pension/SSA		1.00
Household furniture		4,000.00
Stocks and Bonds		32,000.00
1999 Honda Accord		3,500.00
Sub total for bond		72,768.50
Home of conservatee		400,000.00
Total value of estate		\$472,768.50

Calculating the Bond

Income:

Social Security \$ 776.00
Pension 525.00
Interest/dividends 25.00
Total income \$1,326.00
Take
\$1,326 x 12 months =
\$15,912.00

Equation is equal to:

Total liquid assets +
annual income +
recovery premium =
Bond Amount
Assets \$ 72,768.50
Annual Income 15,912.00
Recovery (10%) 7,276.85
Bond for this example
= \$95,957.35

Tasks with time limits

- Post bond, if required, and have Letters of Conservatorship issued.
- Record Letters of Conservatorship with the County Recorder where real property is located within 30 days of appointment.
- File Inventory and Appraisal (GC-040/GC-041) within 90 days from the date of appointment.



Tasks with time limits (cont.)

- Open bank account(s) in Conservatorship name. Account must be interest-bearing.
- File an accounting or waiver of accounting following one year of date of appointment.



Opening a Conservatorship Bank Account

- Account must be in the name of the Conservatorship. Account must be interest-bearing.
- Account must be within FDIC limits.
- Name of account:
 - "Y, Conservator for X, Conservatee"

Opening a Conservatorship Bank Account (cont.)

- If the account is to be blocked, bank should issue a receipt for proof of blocked account. The receipt is to be filed with the court.
- The reporting number for the account must be the Conservatee's social security number.

Additional Tasks

- Maintain accounts in financial institutions
- Review insurance policies – home, auto, medical, long-term care, etc. NOTE: do not change beneficiary.
- Pay taxes (income, real property, personal property, etc.)
- Other tasks – selling securities, filing lawsuits, etc.
- **Note:** Any sale of assets should first be approved by the court unless specific powers are granted (Pr.C. §2590)

Powers without Court Authority

- Use ordinary care and diligence in managing the estate.
- Pay prior debts of Conservatee.
- Collect debts owed to Conservatee.
- Maintain Conservatee's home.
- File tax returns
- **CAUTION:** Cannot hire or refer any business to an entity owned by Conservator without prior court permission

Need Permission!

- Pay for services of Conservator of the Person or Conservator of the Estate.
- Pay for attorney for the Conservator or Conservatee.
- Sell real property.
- Settle various types of claims:
 - relating to real property or which require taking out loans over \$25,000.
 - Claims against you as conservator.
 - Wrongful death, personal injury claims or other litigation.

Important Fee Facts

- Cannot pay yourself without court approval.
- Cannot pay your friends or family to care for the Conservatee or provide other services without court approval.
- May be asked to prove that all fees were reasonable for the Conservatee.

Special Powers when Judge orders

- Power to borrow/lend money.
- Power to contract.
- Power to purchase or sell property.
- Power to lease property.
- Power to operate a business for longer than 45 days.
- Power to exercise stock rights and stock options.

Inventory and Appraisal

- Inventory and Appraisal is prepared on Judicial Council form GC-040/GC-041.
- Cash assets are listed on Attachment No. 1 and appraised by Conservator.
- Non-cash assets are listed on Attachment No. 2 and appraised by the Probate Referee.

Inventory and Appraisal (cont.)

- Appraisal date is date of appointment.
- Inventory must be served on Conservatee, spouse and other relatives.
- Notice of How to Object to Inventory must also be served.

Sale of Conservatee's Residence

- Conservator must discuss sale with Conservatee.
- Court supervision required (Pr.C. §2540)
- Are there other alternatives? Does the Conservatee agree with the sale?
- New Inventory & Appraisal (REAPPRAISAL) required if last one is more than six months old (Pr.C. §2543).



Accounting

- There are mandatory Judicial Council forms for accountings (simplified or standard). GC-400 et seq. Forms can be found through www.courtinfo.ca.gov and link to "forms".
- First accounting is due one year after the date of appointment. Subsequent accountings are due every two years or as otherwise ordered by the Judge.
- Keep good records for your accounting (receipts/expenses).

Accounting (cont.)

- Accountings consist of:
 - Beginning balance (Inventory and Appraisal)
 - Receipts
 - Any gains on sales
 - Disbursements
 - Loss on Sales
 - Property on hand

Accounting (cont.)

- Account must comply with Pr.C. §1061.
- Must include original statements from financial institutions:
 - Non-licensed Conservator: opening statement and ending statement.
 - Licensed Conservator: All statements for the accounting period.

Accounting (cont.)

- Must include original escrow closing statement on sale of real property (if applicable).
- Must include original care facility statements (if applicable).
- Accounts are subject to full or partial review by the court.
- Conservator must make available all books, records, receipts upon request of court.
- May qualify for a waiver of accounting under Pr.C. 2628.

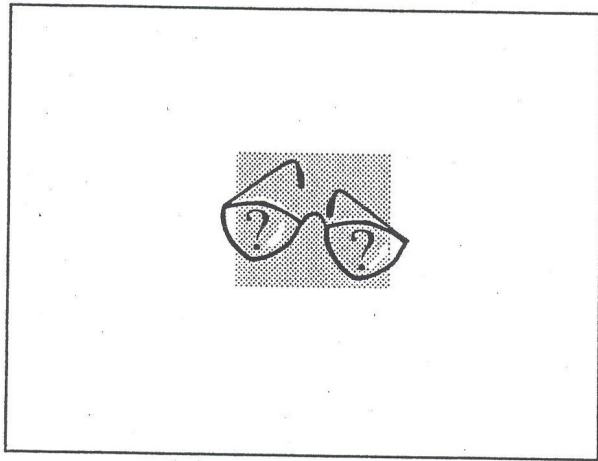
Fees for Conservator

- Conservator and attorney fees are payable only on order of the Court.
- Standards for fee requests:
 - Size of the estate.
 - Benefit to Conservatee from services.
 - Necessity for the services.
 - Hourly rate and itemization of services must be included.

Removal/Surcharge of Conservator

- Poor management of the estate.
- Failure to file an inventory.
- Failure to file an accounting.
- Material errors in the accounting.
- Personal use of Conservatee's assets.
- Violating court orders.
- Paying yourself or your family/friends without court approval.
- Other good cause.





RESOURCE INFORMATION

Administration on Aging

Elder Care Locator

(800) 677-1116

<http://www.aoa.gov/about/over/over.aspx>

For over 35 years, the Administration on Aging has provided home and community-based services to millions of older persons through the programs funded under the Older Americans Act. You may have heard about our home-delivered meals programs or nutrition services in congregate settings, or transportation, adult day care, legal assistance or health promotion programs. If you have visited a nursing home, you may have talked to one of our Ombudsmen, who provide an on-going presence in long-term care facilities, monitoring care and conditions and providing a voice for those who are unable to speak for themselves. Our National Family Caregiver Support Program provides a variety of services to help people who are caring for family members who are chronically ill or who have disabilities.

Alzheimer's Association Nationwide Contact Center

Nationwide Toll-free Number: 1-800-272-3900

<http://www.alz.org/Services/ContactCenter.asp>

Best Buddies, Inland Empire Chapter

22545 Barton Road, Suite 107

Grand Terrace, CA 92313

(909)783-2721

www.bestbuddies.org

Best Buddies is a nonprofit 501(c)(3) organization dedicated to enhancing the lives of people with intellectual disabilities by providing opportunities for one-to-one friendships and integrated employment.

California Courts Self Help Center (Duties of a Conservator)

<http://www.courtinfo.ca.gov/selfhelp/seniors/duties.htm>

Provides information on the following topics: General Information, Conservatee's Rights, Conservator or the Person, Conservator of the Estate, Duty to Disclose of Spouses and Domestic Partners, Limited Conservator (for Developmentally Disabled Persons Only), Temporary Conservator.

<http://www.courtinfo.ca.gov/forms/>

Provides current Judicial Council and the Administrative Office of the Courts forms at no cost.

California Probate Referees Association

<http://probatereferees.org/index.php>

The California Probate Referees Association established this website as an additional resource for help in answering some of the many questions which arise in the probate process. Hopefully, the links on the directory to the left will be useful in providing the answer to some of the more common questions. The "Guide to Using Probate Referees" is a link to our procedures guide which has step-by-step instructions for preparing an Inventory and Appraisal including completed examples. In the event you cannot find the answer to a specific question, you can contact a Probate Referee by simply clicking the "Probate Referee Directory" tab and selecting your county. The page will list all the Referees appointed to your county including their contact and address information.

County of San Bernardino Nutrition Services

<http://hss.sbcounty.gov/daas/nutrition/default.htm>

The Nutrition program includes the procurement, preparation, transportation, service of balance meals and nutrition education to older persons at congregate nutrition sites and to homebound individuals.

Congregate meals are served to senior citizens, 60 years of age or older, and their spouses, at nutrition sites around the county.

RESOURCE INFORMATION

County of San Bernardino Senior Center Guide

http://hss.sbcounty.gov/daas/services/Senior_Centers.htm

Senior Centers provide the senior population of San Bernardino County a place to congregate and participate in a wide range of activities. These centers are located throughout the county.

County of San Bernardino Senior Information and Assistance Program

http://hss.sbcounty.gov/daas/services/Senior_Information_And_Assistance.htm

The Senior Information and Assistance Program provides information and assistance to help a senior citizen solve any problem he or she may have. Clients are provided referrals to other agencies and assistance and advocacy in making contact with organizations and agencies for needed services and programs. Follow up and evaluation are provided to insure the client is receiving the needed services.

Field Offices are located conveniently throughout the county.

Department of Aging and Adult Services (County of San Bernardino)

686 E Mill Street
San Bernardino, CA 92415-0640
(909) 891-3900
<http://hss.sbcounty.gov/daas>

Providing service to seniors and at risk individuals to improve or maintain choice, independence, and quality of life. The Department works to ensure seniors and adults with disabilities have the right to age in a place in the least restrictive environment!

Department on Aging (State of California)

(800) 510-2020
<http://www.aging.ca.gov/>

The Department's mission is to promote the independence and well-being of older adults, adults with disabilities, and families through: access to information and services to improve the quality of their lives; opportunities for community involvement; and support from family members providing care.

Department of Veterans Affairs (County of San Bernardino)

San Bernardino
175 West 5th Street
Second Floor
San Bernardino, CA 92415
(909) 387-5516

Chino
13260 Central Avenue
Second Floor
Chino, CA 91710-4165
(909) 465-5241

Victorville
15456 West Sage Street
Suite 201
Victorville, CA 92392
(760) 843-4300

Loma Linda
11201 Benton Street
Loma Linda, CA 92357
(909) 583-6018

Yucca Valley
56357 Pima Trail
Yucca Valley, CA 92284
(760) 228-5234

Twentynine Palms
73629 Sun Valley Drive
Twentynine Palms, CA 92277
(760) 361-4636

Barstow
100 East Veterans Parkway
Barstow, CA 92311
(760) 252-6257
<http://hss.co.san-bernardino.ca.us/VA/contacts.htm>

The San Bernardino County Department of Veterans Affairs is a department within the Human Services System and was created to assist this county's veterans and their families in obtaining veterans' benefits.

RESOURCE INFORMATION

Department of Veterans Affairs (United States)

Federal Building

11000 Wilshire Blvd

Los Angeles, CA 90024

(800) 827-1000

<http://www2.va.gov/directory/guide/home.asp?isFlash=1>

The mission of the Veterans Benefits Administration, in partnership with the Veterans Health Administration and the National Cemetery Administration, is to provide benefits and services to the veterans and their families in a responsive, timely and compassionate manner in recognition of their service to the Nation.

District Attorney - Elder Abuse (County of San Bernardino)

316 N Mountain View Avenue

San Bernardino, CA 92415

(877) 565-2020

http://www.sbcounty.gov/da/elder_abuse/Intro.asp

Abuse and neglect of the disabled and elderly happens more often than any of us would like to admit. It is serious, and it can happen in any setting.

All of us, as responsible citizens, must help to prevent and stop abuse, neglect, abandonment, and financial exploitation of vulnerable adults by reporting suspected abuse to the appropriate authorities.

Elder Care Locator

(800) 677-1116

<http://www.eldercare.gov/Eldercare.NET/Public/Home.aspx>

The Eldercare Locator is the first step to finding resources for older adults in any U.S. community. Just one phone call or Web site visit instantly connects you to eldercare resources in your community.

Family Caregiver Alliance

180 Montgomery Street, Suite 1100

San Francisco, CA 94104

(415) 434-3388

(800) 445-8106

www.caregiver.org

Founded in 1977, Family Caregiver Alliance was the first community-based nonprofit organization in the country to address the needs of families and friends providing long-term care at home. FCA now offers programs at national, state and local levels to support and sustain caregivers. Although the program is based in San Francisco, their website offers much information for anyone with internet access.

Inland Counties Legal Services

San Bernardino

715 N Arrowhead Avenue

Suite 113

San Bernardino, CA 92401

(909) 884-8615

(800) 677-4257

www.inlandlegal.org

Rancho Cucamonga

10601 Civic Center Drive

Suite 260

Rancho Cucamonga, CA 91730

(909) 980-0982

(800) 977-4257

Victorville

14196 Amargosa Rd

Suite K

Victorville, CA 92392

(760) 241-7073

(888) 805-6455

"Inland Counties Legal Services pursues justice and equality for low income people through counsel, advice, advocacy, and community education, treating all with dignity and respect."

RESOURCE INFORMATION

Inland Regional Center

1365 South Waterman Avenue
San Bernardino, CA 92408
(909) 890-3000
www.inlandrc.org

As an agency among agencies, Inland Regional Center coordinates with generic services to normalize the lives of people with developmental disabilities and their families by working to include them in the everyday routines and life rhythms of the community and by facilitating needed supports for them.

Joslyn Senior Center

21 Grant Street
Redlands, CA 92373
(909) 798-7550
http://www.ci.redlands.ca.us/recreation/joslyn_center.htm

The Joslyn Senior Center, located at 21 Grant Street in Redlands, is a multipurpose facility providing a variety of social, instructional, health and recreational services to Redlands residents 50 years of age and older.

There are meeting rooms, a billiard room with four tables, an auditorium with stage, a kitchen and outdoor patio. The building provides total accessibility to handicapped individuals. The center is open Monday through Friday from 8:00 a.m. to 5:00 p.m., and is available after hours and on weekends for your rental needs.

Established in 1977, Joslyn Senior Center provides daily activities and monthly trips to destinations such as: libraries; museums, Los Angeles, Catalina Island, Santa Barbara, San Diego and more . . . and there are seasonal monthly programs (some with a small fee added). Spring events include: a fashion show; rummage sale; Annual Patron Celebration and Step-Out Walk and Breakfast. Summer events include: a One Buck BBQ, a Step Out Walk and Breakfast, and a Hawaiian Luau. Fun in the fall includes: an African Safari Party, Dessert Bake-off, Halloween costume contest; flu shot clinic and Thanksgiving Luncheon. Winter programs include: an Annual Christmas Program, Bus Light Tour, Holiday Open House, New Year's Open House, Hillbilly Hoedown, and Volunteer Luncheon. Monthly themed-dances add to our year-around fun.

Legal Aid Society of San Bernardino

San Bernardino
354 West Sixth Street
San Bernardino, CA 92401

Rancho Cucamonga
11200 Baseline Street
Rancho Cucamonga, CA 91730

Victorville
15411 Village Drive
Victorville, CA 92392

Chino
13170 Central Avenue
Chino, CA 91710

Chino
5201 D Street
Chino, CA 91710

Joshua Tree
6171 Sunburst Avenue
Joshua Tree, CA 92252

(909) 889-7328
(866) 889-7328
<http://www.legalaidofsb.org>

The specific and primary purpose for which this corporation was formed is to provide counseling and legal services to the indigent and needy, to ascertain that the rights and privileges of the individual are recognized and protected regardless of ability to pay, to develop a keener appreciation and better understanding of the law and the administration of justice, and to otherwise exercise any and all rights and powers which a corporation of this type may now or hereinafter exercise which do not contemplate the distribution of gains, profits or dividends to the members hereof. and low-income persons by guaranteeing access to the judicial system.

National Alliance on Mental Illness (County of San Bernardino Office)

(909) 381-2888
http://www.nami.org/Template.cfm?Section=your_local_NAMI&Template=/CustomSource/LocalDetail.cfm&localID=0000000390&fromHL=no&state=CA

Contact the County of San Bernardino National Alliance on Mental Illness for a full list of services provided.

RESOURCE INFORMATION

National Alliance on Mental Illness (State of California Division Office)

1010 Hurley Way, Ste 195

Sacramento, CA 95825-3218

http://www.nami.org/Template.cfm?Section=your_local_NAMI&Template=/CustomSource/AffiliateFinder.cfm

NAMI recognizes that the key concepts of recovery, resiliency and support are essential to improving the wellness and quality of life of all persons affected by mental illness. Mental illnesses should not be an obstacle to a full and meaningful life for persons who live with them. NAMI will advocate at all levels to ensure that all persons affected by mental illness receive the services that they need and deserve, in a timely fashion.

National Alliance on Mental Illness (United States)

<http://www.nami.org>

NAMI is the National Alliance on Mental Illness, the nation's largest grassroots organization for people with mental illness and their families. Founded in 1979, NAMI has affiliates in every state and in more than 1,100 local communities across the country.

National Family Caregivers Association

10400 Connecticut Avenue, Suite 500

Kensington, MD 20895-3944

(800) 896-3650

(301) 942-6430

www.thefamilycaregiver.org

The National Family Caregivers Association educates, supports, empowers and speaks up for the more than 50 million Americans who care for loved ones with a chronic illness or disability or the frailties of old age. NFCA reaches across the boundaries of diagnoses, relationships and life stages to help transform family caregivers' lives by removing barriers to health and well being.

National Long Term Care Ombudsman Resource Center

1828 L Street, NW Suite 801

Washington, DC 20036

(202) 332-2275

http://www.ltombudsman.org/static_pages/help.cfm

Ombudsmen are dedicated to enhancing the lives of long term care residents.

Public Administrator (County of San Bernardino)

172 W Third Street, 1st Floor

San Bernardino, CA 92415-0360

(909) 387-6249

<https://www.mytaxcollector.com/paDefault.aspx>

The primary function of the Public Administrator is to administer decedents' estates, including: collecting and safeguarding assets, paying debts, and if assets remain after paying debts and expenses, to distribute to those legally entitled. You may also visit the website to inquire about payment of property taxes.

RESOURCE INFORMATION

Public Guardian (County of San Bernardino)

222 W Brookside Avenue

Redlands, CA 92373

(909) 798-8500

<http://hss.sbcounty.gov/DAAS/sales/Default.aspx>

The goal of the Public Guardian-Conservator's office is to insure the safety, both financially and physically, of incompetent and mentally disabled persons, who meet the criteria for conservatorship, as required by law, when there are no viable alternatives to public conservatorship.

Redlands Police Department – Never Alone Safely Back Home (Redlands Residents only)

30 Cajon

PO Box 1025

Redlands, CA 92373

www.redlandspolice.org

Never Alone Safely Back Home is a program designed for those in the Redlands' community who seek a means to provide an additional method of protecting family members or friends who have special needs as they go about their daily routine in our community.

Social Security (Includes information on Supplemental SSI & MediCare)

Redlands

1449 W Redlands Blvd

Redlands, CA 92373

San Bernardino

605 N Arrowhead Avenue Suite 101

San Bernardino, CA 92401

Victorville

13955 Park Avenue

Victorville, CA 92392

Rancho Cucamonga

1100 E Hold Blvd

Rancho Cucamonga, CA 91761

Joshua Tree

56492 29 Palms Hwy

Yucca Valley, CA 92284

(800) 772-1213

(800) 325-0778 (TTY)

<http://www.socialsecurity.gov/>

SSI gives money to low income seniors, the blind and people with disabilities. Whether or not you can get SSI depends on how much money you make and what you own. If you receive Social Security benefits, you may also receive SSI.

Probate Notes Access

- 1) Type www.sb-court.org to reach the Superior Court of California, County of San Bernardino website.
- 2) Scroll down the page until you see the "Probate" heading and select "Probate Notes."
(See illustration below for guidance).
- 3) Once you have reached the "Probate Notes" carefully read the "Viewing Directions & Tips" and the "Important information regarding Probate Notes".

****FYI**** If you wish to contact a Probate Examiner, you may only do so by submitting an email to: ProbateNotes@sb-court.org Keep in mind that examiners may respond only to inquiries regarding the meaning of comments in the notes.

The screenshot shows the homepage of the Superior Court of California, County of San Bernardino. The header includes the court's name and a tagline: "Our Court exists to preserve and protect rights and to effect fair resolutions of all disputes brought to the Court." Below the header is a navigation bar with links: Home, General Info, Locations, Divisions, Jury Information, Self-Help, Forms and Rules, and Employment. The main content area is divided into two columns. The left column features a large image of a court building and a list of "Online Services" including Case Information Online, Check Jury Status, eLegalFile (Forms Court), Pay Ticket Online, Probate Notes, and Self-Help. The right column is titled "News & Notices" and contains two news items dated May 15, 2011 and April 29, 2011. Below these columns is a section with four categories: Criminal / Traffic, Civil / Small Claims Landlord / Tenant, Family Law / Child Support, and Probate. Each category has a "How do I?" button and a list of links. In the Probate section, the "Probate Notes" link is highlighted with a red box.

Superior Court of California, County of San Bernardino

Family Tree

Maternal Grandmother	Maternal Grandfather	Paternal Grandmother	Paternal Grandfather
↖	↗	↖	↗
Mother		Father	
↖		↗	
Siblings	Conservatee	Spouse/Domestic Partner	
↖		↗	
Children	Children	Children	
↖	↓	↘	
Grandchildren	Grandchildren	Grandchildren	

* Only the proposed conservatee must be served personally with the Citation and Petition. All others can be served with the Notice and Petition by mail.

** The Director of Mental Health or the Director of Developmental Service must be served by mail if the proposed conservatee is currently in or on leave from a state hospital under the direction of one of those agencies.

Timeline & Checklist for Conservatorship

Prior to Hearing	30 Days before hearing/15 Days for Limited Conservatorship	1 Week before hearing	4 Weeks after filing/6-8 Weeks for Limited Conservatorship	Within 60 Days from Hearing	Within 90 Days from the Hearing	120 Days from Hearing	1 Year from Hearing
<p>File Petition</p> <p>Take Conservator Training Class</p>	<p>Give Notice, Serve Citation, File Proof of Service</p>	<p>Probate Examiner Notes</p>	<p>Hearing</p> <p>File Orders & Letters if Appointed</p>	<p>File Level of Care Plan</p>	<p>File Notice of Rights & file Proof of Service, File Inventory & Appraisal</p>	<p>Review Hearing</p>	<p>File Accounting for Conservatorship of Estate</p> <p>Court Investigator Report</p>
<p>Immediately after filing:</p> <p><input type="checkbox"/> For limited conservatorship only: Give Notice to Regional Center and file Proof of Service (at least 30 days before hearing).</p> <p><input type="checkbox"/> All Conservatorships: Give Notice to 2nd Degree Relatives (at least 15 days before hearing) and file Proof of Service.</p> <p><input type="checkbox"/> Give Notice to Veterans Administration if VA applies to proposed conservatee (at least 15 days before the hearing) and file Proof of Service.</p> <p><input type="checkbox"/> Serve Citation on proposed Conservatee (at least 15 days before the hearing) and file Proof of Service.</p> <p>Approximately 7-10 Days after filing petition:</p> <p><input type="checkbox"/> Expect a visit from the Court Investigator.</p> <p><input type="checkbox"/> Expect a visit from Court Appointed Attorney.</p> <p><input type="checkbox"/> Regional Center assessment (for limited conservatorship only).</p>							
<p>1 Week before the hearing:</p> <p><input type="checkbox"/> Check Probate Examiners notes at www.sb-court.org</p> <p>Before the hearing:</p> <p>Attend Conservatorship Training Class</p> <p>At the hearing:</p> <p><input type="checkbox"/> If there are no defects and no one objects, the Judge will make an order and appoint the conservator</p> <p><input type="checkbox"/> If there are defects at the hearing or if someone objects, there will be a continuance. Cure the defects and address the objections before the next hearing date.</p> <p><input type="checkbox"/> After the Judge makes an order for approving the petition and appoints a Conservator, file the Orders and Letters.</p> <p>Within 60 Days from appointment/hearing:</p> <p>File level of Care Plan for Conservatorship of Person.</p>				<p>Within 90 Days from appointment:</p> <p><input type="checkbox"/> File Inventory & Appraisal, for Conservatorship of Estate.</p> <p>120 Days from appointment:</p> <p><input type="checkbox"/> There will be a review hearing set, which will be vacated if you are in compliance with all the filing requirements. However, if you are not in compliance you will have to come to the review hearing and show good cause why the Court should not remove you as Conservator, sanction or fine you.</p> <p>After 6 Months from appointment:</p> <p>A hearing will be held at this time, and then every year.</p> <p>1 Year from appointment:</p> <p><input type="checkbox"/> File an accounting, for Conservatorship of Estate. An accounting will be due for Conservatorship of the Estate annually and the court will set review hearings for the accountings.</p>			

IT IS THE RESPONSIBILITY OF THE CONSERVATOR TO ENSURE THAT ALL TASKS ARE COMPLETED IN A TIMELY MANNER.

CONFIDENTIAL

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address): 		
TELEPHONE NO.: E-MAIL ADDRESS (Optional): ATTORNEY FOR (Name):	FAX NO. (Optional):	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BERNARDINO STREET ADDRESS: 216 Brookside Avenue MAILING ADDRESS: 216 Brookside Avenue CITY AND ZIP CODE: Redlands, CA 92373 BRANCH NAME: Redlands District		
CONSERVATORSHIP OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE OF (Name):		
CONFIDENTIAL GENERAL CARE PLAN OF CONSERVATEE		
		CASE NUMBER:
<p align="center"> All questions on this form must be completed and answered. If the question or blank does not apply, write "not applicable" or "none". If you need additional space to fully respond, please note on the form that a separate attachment is being provided and staple the attachment to the form. </p>		

PERSONAL NEEDS

Living Arrangements

Current address of Conservatee: _____ Phone: _____

(Include name of facility if appropriate)

Current living arrangement:

☐ Personal residence ☐ Home of relative ☐ Board & care home ☐ Assisted living ☐ Skilled nursing facility

The Conservatee has been at the present residence since _____

If the Conservatee is in his/her personal residence, what is the current level of care?

☐ No assistance needed at this time.

☐ Household help _____ Hours per week

☐ Personal caregivers _____ Hours per week

What will be necessary to keep the Conservatee in his/her residence?

If the Conservatee is not living in his/her residence:

What is the plan to return Conservatee to his/her personal residence? If there are no plans to return the Conservatee to his/her personal residence in the foreseeable future, explain the limitations or restrictions:

Medical Information

<input type="checkbox"/> Is in good health	<input type="checkbox"/> Is developmentally disabled
<input type="checkbox"/> Confusion / Disorientation	<input type="checkbox"/> Unable to read / write
<input type="checkbox"/> Memory loss	<input type="checkbox"/> Deaf or communication problem
<input type="checkbox"/> Other	

Name	Purpose of Medication	Name	Purpose of Medication

CONFIDENTIAL

CONSERVATORSHIP OF (Name): _____	CASE NUMBER: _____
----------------------------------	--------------------

Provider	Name	Phone number	Last visit
Physician	_____	_____	_____
Dentist	_____	_____	_____
Other <small>(e.g. visiting nurse, case worker)</small>	_____	_____	_____

Visitations

How often do you visit the Conservatee? _____

How often does the Conservatee receive visits from family and friends? _____

Are any visitations particularly valued or upsetting to the Conservatee? _____

Activities

Describe the normal activities of Conservatee:

<input type="checkbox"/> Outings	_____
<input type="checkbox"/> Television / Radio	_____
<input type="checkbox"/> Social	_____
<input type="checkbox"/> Educational	_____
<input type="checkbox"/> Recreational	_____
<input type="checkbox"/> Unwilling to participate	_____ <input type="checkbox"/> Unable to participate _____
<input type="checkbox"/> Other (i.e. reading material)	_____

Special Problems

Explain how you have addressed any special needs or problems raised by the Court Investigator, the Court, or other interested persons: _____

FINANCIAL NEEDS

Estimated Monthly Income

Social Security	\$	_____	Income - other sources	\$	_____
Pension (type _____)	\$	_____	Dividends	\$	_____
Veterans Benefits	\$	_____	Rentals	\$	_____
Supplemental Security Income	\$	_____	Other	\$	_____
Estimated Interest from Investment	\$	_____	TOTAL Estimated Monthly Income \$ _____		

Estimated Monthly Expenses

TAXES	Currently Paid?	Next Due Date	Estimated Monthly Payment
Income	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____	\$ _____
Real Estate	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____	\$ _____

INSURANCE	Company	Premium Paid	Coverage Amount
Estimated Monthly Payment			
Homeowners	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Renters	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Automobile	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Workers Comp	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Health	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Life	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____
Other	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____

LIVING EXPENSES

Rent or Mortgage	\$	_____	Utilities	\$	_____
Nursing Home or			Telephone	\$	_____
Board & Care Home	\$	_____	Laundry and Cleaning	\$	_____
Live-In Attendants	\$	_____	Clothing	\$	_____
Other Care Providers	\$	_____	Entertainment / Recreation	\$	_____
Medical and			Transportation	\$	_____
Dental Supplies	\$	_____	Other	\$	_____
Food	\$	_____	TOTAL Estimated Monthly Expenses \$ _____		

CONFIDENTIAL

CONSERVATORSHIP OF (Name):

CASE NUMBER:

If monthly expenses exceed monthly income, how do you plan to meet the shortfall a) for the present and b) for the long term? _____

Describe any planned changes in investments to be made and/or any major assets that may be sold in the coming year and the reason for these changes and/or sales: _____

Identify the contents of any safety deposit box. _____

Are there any valuable assets in the conservatee's residence that need to be protected? If so, describe them and specify what steps have been take to protect these items from loss or theft: _____

Conservator believes it will be necessary to provide the following additional services to properly care for and maintain the personal and financial needs of the Conservatee: _____

The undersigned conservator will:

- a. Carry out all mandatory duties of a conservator (refer to form GC-348);
- b. Maintain periodic contact with the conservatee's family and friends, if applicable;
- c. Be available to the conservatee on a 24-hour basis for emergencies, or arrange for such coverage by a qualified agent;

If appointed conservator of the estate

- d. Inventory all assets in which the conservatee has any interest;
- e. Render timely, accurate and complete accountings to the court;
- f. Maintain accurate records related to the estate;
- g. Maintain all estate assets in interest-bearing account, except as necessary for everyday administration;
- h. Maintain an adequate surety bond as required by law;

If appointed conservator of the person

- i. Maintain periodic contact with the conservatee's physician and other health care providers.
- j. Maintain conservatee in the least restrictive placement and, if moved, notice the court and interested parties.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that I have retained a copy of this case plan for my records.

Date Attorney Date Conservator

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address): SAMUEL MATLOCK (STATE BAR NO. 12345) MATLOCK & ASSOCIATES PO BOX 123 ANYTOWN, CA 01293	FOR COURT USE ONLY <u>PRE-APPRAISAL SAMPLE</u>
TELEPHONE NO.: (909) 123-4567 FAX NO. (Optional): E-MAIL ADDRESS (Optional): ATTORNEY FOR (Name): JOE TUDBALL	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BERNARDINO STREET ADDRESS: 303 WEST THIRD STREET MAILING ADDRESS: 303 WEST THIRD STREET CITY AND ZIP CODE: SAN BERNARDINO 92415 BRANCH NAME: SAN BERNARDINO CIVL AND PROBATE DIVISION	
ESTATE OF (Name): MAGGIE WIGGINS <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> DECEDENT <input checked="" type="checkbox"/> CONSERVATEE <input type="checkbox"/> MINOR </div>	
INVENTORY AND APPRAISAL <div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> Partial No.: <input checked="" type="checkbox"/> Final <input type="checkbox"/> Supplemental </div> <div> <input type="checkbox"/> Corrected <input type="checkbox"/> Reappraisal for Sale <input type="checkbox"/> Property Tax Certificate </div> </div>	CASE NUMBER: CON PS 0600123 Date of Death of Decedent or of Appointment of Guardian or Conservator:

APPRAISALS

1. Total appraisal by representative, guardian, or conservator (Attachment 1):
2. Total appraisal by referee (Attachment 2):

\$
\$
\$
TOTAL: \$

DECLARATION OF REPRESENTATIVE, GUARDIAN, CONSERVATOR, OR SMALL ESTATE CLAIMANT

3. Attachments 1 and 2 together with all prior inventories filed contain a true statement of
☒ all ☐ a portion of the estate that has come to my knowledge or possession, including particularly all money and all just claims the estate has against me. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 1.
4. ☐ No probate referee is required. ☐ by order of the court dated (specify):
5. **Property tax certificate.** I certify that the requirements of Revenue and Taxation Code section 480
 - a. ☐ are not applicable because the decedent owned no real property in California at the time of death.
 - b. ☐ have been satisfied by the filing of a change of ownership statement with the county recorder or assessor of each county in California in which the decedent owned property at the time of death.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: JANUARY 31, 2008

JOE TUDBALL

(TYPE OR PRINT NAME; INCLUDE TITLE IF CORPORATE OFFICER)

(SIGNATURE)

STATEMENT ABOUT THE BOND

(Complete in all cases. Must be signed by attorney for fiduciary, or by fiduciary without an attorney.)

6. ☐ Bond is waived, or the sole fiduciary is a corporate fiduciary or an exempt government agency.
7. ☒ Bond filed in the amount of: \$ 98,000 ☒ Sufficient ☐ Insufficient
8. ☐ Receipts for: \$ have been filed with the court for deposits in a blocked account at (specify institution and location):

Date: JANUARY 31, 2008

SAMUEL MATLOCK (STATE BAR NO. 12345)

(TYPE OR PRINT NAME)

(SIGNATURE OF ATTORNEY OR PARTY WITHOUT ATTORNEY)

ESTATE OF (Name): MAGGIE WIGGINS		CASE NUMBER:
<input type="checkbox"/> DECEDENT	<input checked="" type="checkbox"/> CONSERVATEE	CON PS 0600123
<input type="checkbox"/> MINOR		

DECLARATION OF PROBATE REFEREE

9. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 2.
10. A true account of my commission and expenses actually and necessarily incurred pursuant to my appointment is:
- Statutory commission: \$
- Expenses (specify): \$
- TOTAL: \$**

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

(TYPE OR PRINT NAME)

(SIGNATURE OF REFEREE)

INSTRUCTIONS

(See Probate Code sections 2610-2616, 8801, 8804, 8852, 8905, 8960, 8961, and 8963 for additional instructions.)

1. See Probate Code section 8850 for items to be included in the inventory.
2. If the minor or conservatee is or has been during the guardianship or conservatorship confined in a state hospital under the jurisdiction of the State Department of Mental Health or the State Department of Developmental Services, mail a copy to the director of the appropriate department in Sacramento. (Prob. Code, § 2611.)
3. The representative, guardian, conservator, or small estate claimant shall list on Attachment 1 and appraise as of the date of death of the decedent or the date of appointment of the guardian or conservator, at fair market value, moneys, currency, cash items, bank accounts and amounts on deposit with each financial institution (as defined in Probate Code section 40), and the proceeds of life and accident insurance policies and retirement plans payable upon death in lump sum amounts to the estate, except items whose fair market value is, in the opinion of the representative, an amount different from the ostensible value or specified amount.
4. The representative, guardian, conservator, or small estate claimant shall list in Attachment 2 all other assets of the estate which shall be appraised by the referee.
5. If joint tenancy and other assets are listed for appraisal purposes only and not as part of the probate estate, they must be separately listed on additional attachments and their value excluded from the total valuation of Attachments 1 and 2.
6. Each attachment should conform to the format approved by the Judicial Council. (See *Inventory and Appraisal Attachment* (form DE-161/GC-041) and Cal. Rules of Court, rules 2.100—2.119.)

ESTATE OF (Name): MAGGIE WIGGINS

CASE NUMBER:

PRO PS 0600123

INVENTORY AND APPRAISAL

ATTACHMENT NO: 1

(In decedents' estates, attachments must conform to Probate

Code section 8850(c) regarding community and separate property.)

Page: 1 of: 1 total pages.

(Add pages as required.)

Item No.	Description	Appraised value
1.	CASH FOUND IN CONSERVATEE'S HOME	\$277.60
2.	BANK OF AMERICA, REDLANDS, CALIFORNIA BRANCH CHECKING ACCOUNT NO. 24525 35672	\$2,435.67
3.	WELL FARGO SAVINGS, REDLANDS, CALIFORNIA BRANCH SAVINGS ACCOUNT NO. 324 72394523	\$26,454.23
4.	UNCASHED CHECK FROM INTERNAL REVENUE SERVICE PAYABLE TO CONSERVATEE, DATED BEFORE DATE OF APPOINTMENT	\$4,100.00
5.	RIGHT TO RECEIVE SOCIAL SECURITY INCOME	F.Y.I
TOTAL ATTACHMENT NO. 1		\$33,268.50

ESTATE OF (Name): MAGGIE WIGGINS

CASE NUMBER:

PRO PS 0600123

INVENTORY AND APPRAISAL

ATTACHMENT NO: 2

(In decedents' estates, attachments must conform to Probate

Code section 8850(c) regarding community and separate property.)

Page: 1 of 1 total pages.

(Add pages as required.)

Item No.DescriptionAppraised value

- | | | |
|----|--|--|
| 1. | RESIDENTIAL REAL PROPERTY LOCATED AT
493 KATHLEEN PLACE, SAN BERNARDINO, CALIFORNIA
DESCRIBED AS FOLLOWS
LOT 34, BLOCK C, TRACT NO. 316, ORANGE TREE
HOMESTEADM #1, SHOWN ON MAP ON FILE IN BOOK 2 OR
MAPS, AT PAGE 63, OFFICIAL RECORDS OF SAN
BERNARDINO COUNTY, CALIFORNIA
APN 723-234-324 | \$ _____ |
| 2. | HOUSEHOLD FURNITURE AND FURNISHINGS AT
493 KATHLEEN PLACE, SAN BERNARDINO, CALIFORNIA | \$ _____ |
| 3. | 1999 HONDA ACCORD, 4 DOOR, VIN URADBAlHY23HEY0711
APPROXIMATELY 32,000 MILES, IN GOOD CONDITION | \$ _____ |
| 4. | MORGAN STANLEY INVESTMENT
ACCOUNT NO.234-62349323

450 SHARES OF MICROSOFT CORPORATION, COMMON
STOCK (MSFT)
CUSIP 594918104
23 SHARES OF WORLD WRESTLING ENTERTAINMENT
(WWE)
CSUIP 98157510
206 SHARES OF T. ROWE PRICE NEW INCOME
MUTUAL FUND (PRCX)
CSUIP 779570100 | \$ _____

\$ _____

\$ _____

\$ _____ |
| | TOTAL ATTACHMENT NO. 2 | \$ _____ |

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address): SAMUEL MATLOCK (STATE BAR NO. 12345) MATLOCK & ASSOCIATES PO BOX 123 ANYTOWN, CA 01293 TELEPHONE NO.: (909) 123-4567 FAX NO. (Optional): E-MAIL ADDRESS (Optional): ATTORNEY FOR (Name): JOE TUDBALL	FOR COURT USE ONLY <u>POST-APPRAISAL SAMPLE</u>
SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BERNARDINO STREET ADDRESS: 303 WEST THIRD STREET MAILING ADDRESS: 303 WEST THIRD STREET CITY AND ZIP CODE: SAN BERNARDINO 92415 BRANCH NAME: SAN BERNARDINO CIVL AND PROBATE DIVISION	
ESTATE OF (Name): MAGGIE WIGGINS <input type="checkbox"/> DECEDENT <input checked="" type="checkbox"/> CONSERVATEE <input type="checkbox"/> MINOR	
INVENTORY AND APPRAISAL <input type="checkbox"/> Partial No.: <input type="checkbox"/> Corrected <input checked="" type="checkbox"/> Final <input type="checkbox"/> Reappraisal for Sale <input type="checkbox"/> Supplemental <input type="checkbox"/> Property Tax Certificate	CASE NUMBER: CON PS 0600123 Date of Death of Decedent or of Appointment of Guardian or Conservator:

APPRAISALS

- | | |
|--|------------------|
| 1. Total appraisal by representative, guardian, or conservator (Attachment 1): | \$ |
| 2. Total appraisal by referee (Attachment 2): | \$ |
| | \$ |
| | TOTAL: \$ |

DECLARATION OF REPRESENTATIVE, GUARDIAN, CONSERVATOR, OR SMALL ESTATE CLAIMANT

3. Attachments 1 and 2 together with all prior inventories filed contain a true statement of
☒ all ☐ a portion of the estate that has come to my knowledge or possession, including particularly all money and all just claims the estate has against me. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 1.
4. ☐ No probate referee is required ☐ by order of the court dated (specify):
5. **Property tax certificate.** I certify that the requirements of Revenue and Taxation Code section 480
 a. ☐ are not applicable because the decedent owned no real property in California at the time of death.
 b. ☐ have been satisfied by the filing of a change of ownership statement with the county recorder or assessor of each county in California in which the decedent owned property at the time of death.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: JANUARY 31, 2008

JOE TUDBALL

(TYPE OR PRINT NAME; INCLUDE TITLE IF CORPORATE OFFICER)

(SIGNATURE)

STATEMENT ABOUT THE BOND

(Complete in all cases. Must be signed by attorney for fiduciary, or by fiduciary without an attorney.)

6. ☐ Bond is waived, or the sole fiduciary is a corporate fiduciary or an exempt government agency.
7. ☒ Bond filed in the amount of: \$ 98,000 ☒ Sufficient ☐ Insufficient
8. ☐ Receipts for: \$ have been filed with the court for deposits in a blocked account at (specify institution and location):

Date: JANUARY 31, 2008

SAMUEL MATLOCK (STATE BAR NO. 12345)

(TYPE OR PRINT NAME)

(SIGNATURE OF ATTORNEY OR PARTY WITHOUT ATTORNEY)

ESTATE OF (Name): MAGGIE WIGGINS		CASE NUMBER:
<input type="checkbox"/> DECEDENT	<input checked="" type="checkbox"/> CONSERVATEE	CON PS 0600123
<input type="checkbox"/> MINOR		

DECLARATION OF PROBATE REFEREE

9. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 2.
10. A true account of my commission and expenses actually and necessarily incurred pursuant to my appointment is:
- Statutory commission: \$
- Expenses (specify): \$
- TOTAL: \$

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

(TYPE OR PRINT NAME)

(SIGNATURE OF REFEREE)

INSTRUCTIONS

(See Probate Code sections 2610-2616, 8801, 8804, 8852, 8905, 8960, 8961, and 8963 for additional instructions.)

1. See Probate Code section 8850 for items to be included in the inventory.
2. If the minor or conservatee is or has been during the guardianship or conservatorship confined in a state hospital under the jurisdiction of the State Department of Mental Health or the State Department of Developmental Services, mail a copy to the director of the appropriate department in Sacramento. (Prob. Code, § 2611.)
3. The representative, guardian, conservator, or small estate claimant shall list on Attachment 1 and appraise as of the date of death of the decedent or the date of appointment of the guardian or conservator, at fair market value, moneys, currency, cash items, bank accounts and amounts on deposit with each financial institution (as defined in Probate Code section 40), and the proceeds of life and accident insurance policies and retirement plans payable upon death in lump sum amounts to the estate, except items whose fair market value is, in the opinion of the representative, an amount different from the ostensible value or specified amount.
4. The representative, guardian, conservator, or small estate claimant shall list in Attachment 2 all other assets of the estate which shall be appraised by the referee.
5. If joint tenancy and other assets are listed for appraisal purposes only and not as part of the probate estate, they must be separately listed on additional attachments and their value excluded from the total valuation of Attachments 1 and 2.
6. Each attachment should conform to the format approved by the Judicial Council. (See *Inventory and Appraisal Attachment* (form DE-161/GC-041) and Cal. Rules of Court, rules 2.100—2.119.)

ESTATE OF (Name): MAGGIE WIGGINS

CASE NUMBER:

PRO PS 0600123

INVENTORY AND APPRAISAL

ATTACHMENT NO: 1

(In decedents' estates, attachments must conform to Probate

Code section 8850(c) regarding community and separate property.)

Page: 1 of: 1 total pages.

(Add pages as required.)

Item No.	Description	Appraised value
1.	CASH FOUND IN CONSERVATEE'S HOME	\$277.60
2.	BANK OF AMERICA, REDLANDS, CALIFORNIA BRANCH CHECKING ACCOUNT NO. 24525 35672	\$2,435.67
3.	WELL FARGO SAVINGS, REDLANDS, CALIFORNIA BRANCH SAVINGS ACCOUNT NO. 324 72394523	\$26,454.23
4.	UNCASHED CHECK FROM INTERNAL REVENUE SERVICE PAYABLE TO CONSERVATEE, DATED BEFORE DATE OF APPOINTMENT	\$4,100.00
5.	RIGHT TO RECEIVE SOCIAL SECURITY INCOME	F.Y.I
TOTAL ATTACHMENT NO. 1		\$33,268.50

ESTATE OF (Name): MAGGIE WIGGINS

CASE NUMBER:

PRO PS 0600123

INVENTORY AND APPRAISAL ATTACHMENT NO: 2

(In decedents' estates, attachments must conform to Probate

Code section 8850(c) regarding community and separate property.)

Page: 1 of 1 total pages.

(Add pages as required.)

<u>Item No.</u>	<u>Description</u>	<u>Appraised value</u>
1.	RESIDENTIAL REAL PROPERTY LOCATED AT 493 KATHLEEN PLACE, SAN BERNARDINO, CALIFORNIA DESCRIBED AS FOLLOWS LOT 34, BLOCK C, TRACT NO. 316, ORANGE TREE HOMESTEADM #1, SHOWN ON MAP ON FILE IN BOOK 2 OR MAPS, AT PAGE 63, OFFICIAL RECORDS OF SAN BERNARDINO COUNTY, CALIFORNIA APN 723-234-324	\$400,000.00
2.	HOUSEHOLD FURNITURE AND FURNISHINGS AT 493 KATHLEEN PLACE, SAN BERNARDINO, CALIFORNIA	\$4,000.00
3.	1999 HONDA ACCORD, 4 DOOR, VIN URADBAlHY23HEY0711 APPROXIMATELY 32,000 MILES, IN GOOD CONDITION	\$3,500.00
4.	MORGAN STANLEY INVESTMENT ACCOUNT NO.234-62349323	
	450 SHARES OF MICROSOFT CORPORATION, COMMON STOCK (MSFT) CUSIP 594918104	\$10,000.00
	23 SHARES OF WORLD WRESTLING ENTERTAINMENT (WWE) CSUIP 98157510	\$7,000.00
	206 SHARES OF T. ROWE PRICE NEW INCOME MUTUAL FUND (PRCX) CSUIP 779570100	\$15,000.00
	TOTAL ATTACHMENT NO. 2	\$439,500.00

<input checked="" type="checkbox"/> CONSERVATORSHIP <input type="checkbox"/> GUARDIANSHIP OF (Name): MAGGIE WIGGINS	CASE NUMBER: CONPS0600125
<input checked="" type="checkbox"/> Conservatee <input type="checkbox"/> Minor	

SUMMARY OF ACCOUNT—STANDARD AND SIMPLIFIED ACCOUNTS

First _____ ☐ (Check if final.) and Final Account ☐ (Check if interim.) Account Current
 Account number ("First," etc.)

January 29, 2008 through January 28, 2009
 Opening date of account Closing date of account

CHARGES*

Property on Hand at Beginning of Account Period, consisting of:		
1a	Cash Assets	\$ 33,268.50
1b	Non-Cash Assets (carry value)	439,500.00
1c	Total Property on Hand at Beginning of Account Period (add 1a and 1b)	\$ 472,768.50
2	Additional Property Received During Period of Account — Schedule	0.00
3	Receipts During Period of Account — Schedule A	15,957.97
4	Gains on Sales During Period of Account — Schedule B	0.00
5	Other Charges (describe): — Schedule	0.00
6	Net Income From Trade or Business During Period of Account — Schedule	0.00
7	TOTAL CHARGES (add 1c, 2, 3, 4, 5, and 6)	\$ 488,726.47

CREDITS*

8	Disbursements During Period of Account — Schedule C	\$ 21,037.02
9	Losses on Sales During Period of Account — Schedule D	0.00
10	Distributions to Conservatee or Ward — Schedule	0.00
11	Other Credits (describe): — Schedule	0.00
12	Net Loss From Trade or Business During Period of Account — Schedule	0.00
Property on Hand at End of Account Period — Schedule E, consisting of:		
13a	Cash Assets	\$ 28,189.45
13b	Non-Cash Assets (carry value)	439,500.00
13c	Total Property on Hand at End of Account Period (add 13a and 13b)	467,689.45
14	TOTAL CREDITS (add 8, 9, 10, 11, 12, and 13c)	\$ 488,726.47

* (Enter "0" for all categories of charges or credits for which you have no entries. Do not include schedules for these categories, but do not relabel or redesignate the schedules that are included.)

Conservatorship of	MAGGIE WIGGINS,	Case Number
	Conservatee	CONPS0600123

Schedule A, Receipts, Dividends - Standard Account

Dividends

Date of Receipt (mm/dd/yyyy)	Description	Amounts
3/31/2008	Dividend on MSFT	12.62
3/31/2008	Dividend on WWE	16.25
3/31/2008	Dividend on PRCIX	23.32
6/30/2008	Dividend on MSFT	19.32
6/30/2008	Dividend on WWE	21.62
6/30/2008	Dividend on PRCIX	12.62
9/30/2008	Dividend on MSFT	30.23
9/30/2008	Dividend on WWE	52.21
9/30/2008	Dividend on PRCIX	23.52
12/31/2008	Dividend on MSFT	51.23
12/31/2008	Dividend on WWE	23.33
12/31/2008	Dividend on PRCIX	31.11
Subtotal, Dividends:		317.38

Conservatorship of	MAGGIE WIGGINS,	Case Number
	Conservatee	CONPS0600123

Schedule A, Receipts, Interest - Standard Account

Interest

Date of Receipt (mm/dd/yyyy)	Description	Amounts
1/31/2008	Interest on Wells Fargo Savings Account	1.43
2/29/2008	Interest on Wells Fargo Savings Account	1.38
3/31/2008	Interest on Wells Fargo Savings Account	1.50
4/30/2008	Interest on Wells Fargo Savings Account	1.45
5/31/2008	Interest on Wells Fargo Savings Account	1.42
6/30/2008	Interest on Wells Fargo Savings Account	1.45
7/31/2008	Interest on Wells Fargo Savings Account	1.53
8/31/2008	Interest on Wells Fargo Savings Account	1.22
9/30/2008	Interest on Wells Fargo Savings Account	1.20
10/31/2008	Interest on Wells Fargo Savings Account	0.98
11/30/2008	Interest on Wells Fargo Savings Account	0.83
12/31/2008	Interest on Wells Fargo Savings Account	1.20
Subtotal, Interest:		15.59

Conservatorship of	MAGGIE WIGGINS,	Case Number
	Conservatee	CONPS0600123

**Schedule A, Receipts, Pensions, Annuities, and Other Regular Periodic Payments -
Standard Account**

Pensions, annuities, and other regular periodic payments

Date of Receipt (mm/dd/yyyy)	Description	Amounts
1/31/2008	Worker's Pension	525.00
2/29/2008	Worker's Pension	525.00
3/31/2008	Worker's Pension	525.00
4/30/2008	Worker's Pension	525.00
5/31/2008	Worker's Pension	525.00
6/30/2008	Worker's Pension	525.00
7/31/2008	Worker's Pension	525.00
8/31/2008	Worker's Pension	525.00
9/30/2008	Worker's Pension	525.00
10/31/2008	Worker's Pension	525.00
11/30/2008	Worker's Pension	525.00
12/31/2008	Worker's Pension	525.00
Subtotal, Pensions, Annuities, Other Regular or Periodic Payments		6,300.00

Conservatorship of	MAGGIE WIGGINS,	Case Number
	Conservatee	CONPS0600123

**Schedule A, Receipts, Social Security, Veterans' Benefits, Other Public Benefits -
Standard Account**

Social Security, veterans' benefits, and other public benefit payments

Date of Receipt (mm/dd/yyyy)	Description	Amounts
2/1/2008	Social Security Income	776.00
3/2/2008	Social Security Income	776.00
4/1/2008	Social Security Income	776.00
5/2/2008	Social Security Income	776.00
6/3/2008	Social Security Income	776.00
7/1/2008	Social Security Income	776.00
8/1/2008	Social Security Income	776.00
9/2/2008	Social Security Income	776.00
10/1/2008	Social Security Income	776.00
11/1/2008	Social Security Income	776.00
12/3/2008	Social Security Income	776.00
1/2/2009	Social Security Income	789.00
Subtotal, Social Security, Veterans' Benefits, Other Public Benefits		9,325.00

Conservatorship of	Case Number
MAGGIE WIGGINS,	
Conservatee	CONPS0600123

Schedule C, Disbursements, Conservatee's Caregiver Expenses - Standard Account

Conservatee's caregiver expenses

Date (mm/dd/yyyy)	Check No.	Description	Amounts
2/5/2008	1102	Louis Martinez, Caregiver	150.00
2/19/2008	1106	Louis Martinez, Caregiver	150.00
3/4/2008	1110	Louis Martinez, Caregiver	150.00
3/18/2008	1113	Louis Martinez, Caregiver	150.00
4/1/2008	1115	Louis Martinez, Caregiver	150.00
4/15/2008	1118	Louis Martinez, Caregiver	150.00
4/29/2008	1120	Louis Martinez, Caregiver	150.00
5/13/2008	1125	Louis Martinez, Caregiver	150.00
5/27/2008	1130	Louis Martinez, Caregiver	150.00
6/10/2008	1132	Louis Martinez, Caregiver	150.00
6/24/2008	1133	Louis Martinez, Caregiver	150.00
7/8/2008	1135	Louis Martinez, Caregiver	150.00
7/22/2008	1138	Louis Martinez, Caregiver	150.00
8/5/2008	1140	Louis Martinez, Caregiver	150.00
8/19/2008	1145	Louis Martinez, Caregiver	150.00
9/2/2008	1148	Louis Martinez, Caregiver	150.00
9/16/2008	1150	Louis Martinez, Caregiver	150.00
9/30/2008	1151	Louis Martinez, Caregiver	150.00
10/14/2008	1153	Louis Martinez, Caregiver	150.00
10/28/2008	1155	Louis Martinez, Caregiver	150.00
11/11/2008	1157	Louis Martinez, Caregiver	150.00
11/25/2008	1160	Louis Martinez, Caregiver	150.00
12/9/2008	1165	Louis Martinez, Caregiver	150.00
12/23/2008	1167	Louis Martinez, Caregiver	150.00
1/6/2009	1169	Louis Martinez, Caregiver	150.00
1/20/2009	1173	Louis Martinez, Caregiver	150.00
Subtotal, Conservatee's Caregiver Expenses:			3,900.00

Conservatorship of	MAGGIE WIGGINS,	Case Number
	Conservatee	CONPS0600123

**Schedule C, Disbursements, Conservatee's Residential or Long-Term Care Facility Expenses -
Standard Account**

Conservatee's residential or long-term care facility expenses

Date (mm/dd/yyyy)	Check No.	Description	Amounts
2/2/2008	1101	Shining Rivers Retirement Home	950.00
3/3/2008	1109	Shining Rivers Retirement Home	950.00
4/1/2008	1116	Shining Rivers Retirement Home	950.00
4/30/2008	1121	Shining Rivers Retirement Home	950.00
6/2/2008	1131	Shining Rivers Retirement Home	950.00
7/3/2008	1134	Shining Rivers Retirement Home	950.00
8/1/2008	1139	Shining Rivers Retirement Home	950.00
9/1/2008	1147	Shining Rivers Retirement Home	950.00
10/2/2008	1152	Shining Rivers Retirement Home	950.00
11/3/2008	1156	Shining Rivers Retirement Home	950.00
12/1/2008	1163	Shining Rivers Retirement Home	950.00
1/2/2009	1168	Shining Rivers Retirement Home	1,000.00
Subtotal, Conservatee's Residential or Long-Term Care Facility Expenses:			11,450.00

Conservatorship of	MAGGIE WIGGINS,	Case Number
	Conservatee	CONPS0600123

Schedule C, Disbursements, Fiduciary and Attorney Fees - Standard Account
Fees of conservator or guardian and his or her attorney paid from estate of conservatee or ward

Date of Payment (mm/dd/yyyy)	Date of Order Authorizing Distribution (mm/dd/yyyy)	Check No.	Payee	Amounts
10/23/2008	10/21/2008	1001	Matlock & Associates, Attorneys at Law	1,200.00
10/23/2008	10/21/2008	1002	Joe Tudball	950.00
Subtotal, Fiduciary and Attorney Fees:				2,150.00

Conservatorship of	MAGGIE WIGGINS,	Case Number
	Conservatee	CONPS0600123

Schedule C, Disbursements, General Administration Expenses - Standard Account

General administration expenses paid by the estate other than fees of conservator or attorney

Date (mm/dd/yyyy)	Check No.	Description	Amounts
5/14/2008	1126	Bond Services of California	125.00
11/13/2008	1159	Court Investigator	350.00
11/13/2008	1160	Clerk of the Court - Certified Copy of Letters	16.50
Subtotal, General Administration Expenses:			491.50

Conservatorship of	Case Number
MAGGIE WIGGINS,	
Conservatee	CONPS0600123

Schedule C, Disbursements, Investment Expenses - Standard Account

Investment Expenses

Date (mm/dd/yyyy)	Check No.	Description	Amounts
6/20/2008	n/a	Bank Charge	12.00
8/5/2008	n/a	Wire Transfer Fee	15.00
12/31/2008	n/a	Bank Charge	12.00
Subtotal, Investment Expenses:			39.00

Conservatorship of	MAGGIE WIGGINS,	Case Number
	Conservatee	CONPS0600123

Schedule C, Disbursements, Living Expenses - Standard Account

Living Expenses

Date (mm/dd/yyyy)	Check No.	Description	Amounts
2/7/2008	1103	AT&T	52.37
3/1/2008	1108	Wal-Mart for Clothes and Vitamins for Conservatee	186.75
4/13/2008	1117	Netflix	18.65
5/20/2008	1128	Home Depot for storage containers to organize garage	982.52
8/31/2008	1146	Vons for conservatee's stash of chocolate	102.05
10/21/2008	1154	Macy's for new pajamas, housecoat and slippers	246.53
11/29/2008	1162	JCPenney for new towels and sheets	452.32
1/26/2009	1175	Toys R' Us for puzzles to stimulate conservatee's mind	243.99
Subtotal, Living Expenses:			2,285.18

Conservatorship of	MAGGIE WIGGINS,	Case Number
	Conservatee	CONPS0600123

Schedule C, Disbursements, Medical Expenses - Standard Account

Medical Expenses of conservatee or ward

Date (mm/dd/yyyy)	Check No.	Description	Amounts
9/4/2008	1149	New Millenium Medical Associates	146.34
11/12/2008	1158	Beaver Medical Group Co-pay	10.00
1/10/2009	1171	Independent Health Care Services	565.00
Subtotal, Medical Expenses:			721.34

Conservatorship of	Case Number
MAGGIE WIGGINS,	
Conservatee	CONPS0600123

Schedule E, Non-Cash Assets on Hand at End of Account Period - Standard Account

Non-Cash Assets on Hand as of January 28, 2009

Description of Non-Cash Assets	Estimated Market Value	Carry Value
Residential real property located at 493 Kathleen Place, San Bernardino, California Lot 34, Block C, Tract No. 316, Long Island Homestead, #1, shown on the map on file in Book 2 of Maps, at Page 63, Official Records of San Bernardino County, California. Assessor's Parcel # 723-234-324	325,000.00	400,000.00
Household furniture and furnishings at 493 Kathleen Place, San Bernardino, California 92401	4,000.00	4,000.00
1999 Honda Accord 4 door, VIN URADBAIHY23HEY0711, approximately 32,000 miles, in good condition	2,250.00	3,500.00
Morgan Stanley Investment Account #234-62349323 450 shares of Microsoft Corporation, common stock (MSFT). CUSIP 594918104	8,500.00	10,000.00
23 shares of World Wrestling Entertainment (WWE). CUSIP 98157510	2,359.00	7,000.00
206 shares of T. Rowe Price New Income Mutual Fund (PRCIX) CUSIP 779570100	11,164.00	15,000.00
Total, Non-Cash Assets:	353,273.00	439,500.00

Conservatorship of

MAGGIE WIGGINS,

Case Number

Conservatee

CONPS0600123

Schedule F, Changes in Form of Assets - Standard Account

Changes in Form of Assets During the Account Period

Date (mm/dd/yyyy)	Transaction
1/27/2009	Transferred remaining money from Bank of America Checking Account to Citibank Checking Account # 573214234

Conservatorship of	MAGGIE WIGGINS,	Case Number
	Conservatee	CONPS0600123

Schedule G, Liabilities at End of Account Period - Standard Account

Liabilities at End of Account Period

Description of Liabilities

Mastercard Credit Card with a balance of \$1,268.65

Conservatorship of	Case Number
MAGGIE WIGGINS,	
Conservatee	CONPS0600123

Non-Cash Assets on Hand at Beginning of Account Period - Standard Account

Non-Cash Assets on Hand as of January 29, 2008

Description of Non-Cash Assets	Estimated Market Value	Carry Value
Residential real property located at 493 Kathleen Place, San Bernardino, California Lot 34, Block C, Tract No. 316, Orange Tree Homestead, #1, shown on the map on file in Book 2 of Maps, at Page 63, Official Records of San Bernardino County, California. Assessor's Parcel # 723-234-324	400,000.00	400,000.00
Household furniture and furnishings at 493 Kathleen Place, San Bernardino, California 92401	4,000.00	4,000.00
1999 Honda Accord 4 door, VIN URADBAIHY23HEY0711, approximately 32,000 miles, in good condition	3,500.00	3,500.00
Morgan Stanley Investment Account #234-62349323 450 shares of Microsoft Corporation, common stock (MSFT). CUSIP 594918104	10,000.00	10,000.00
23 shares of World Wrestling Entertainment (WWE). CUSIP 98157510	7,000.00	7,000.00
206 shares of T. Rowe Price New Income Mutual Fund (PRCIX) CUSIP 779570100	15,000.00	15,000.00
Total, Non-Cash Assets:	439,500.00	439,500.00

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address):		FOR COURT USE ONLY
TELEPHONE NO.: E-MAIL ADDRESS (Optional):		
FAX NO. (Optional):		
ATTORNEY FOR (Name):		
SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BERNARDINO STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:		
<input type="checkbox"/> CONSERVATORSHIP <input type="checkbox"/> GUARDIANSHIP OF (Name):		
EX PARTE PETITION TO DISPENSE WITH ACCOUNTING AND ORDER (Probate Code §2628)		CASE NUMBER:

- I am (we are) now the duly appointed, qualified, and acting conservator(s)/guardian(s) of the estate of said conservatee/minor(s).
- Petitioner's accounting, if presented, would cover the period from _____ [date] through and including _____ [date].
- The estate at the beginning and end of this period of account consisted of property of a total net value of less than \$15,000.00 and the property on hand at the end of this accounting period is \$_____.
- Income of the estate for each month of this period of account, exclusive of public benefit payments, was less than \$2,000.00. All of the income of the estate during this period of account, if not retained, was spent for the benefit of the conservatee/minor.
- During this period of account, petitioner has managed and administered the conservatee's estate with ordinary care and diligence, has provided for the conservatee's/minor's care, has paid the expenses of said care, has collected assets of the estate, and has provided for their safekeeping. Petitioner is not requesting compensation.
- During the accounting period, the conservatee/minor has resided at

_____.
- ☐ No Request for Special Notice has been filed in this matter.
☐ Request for Special Notice has been filed and notice has been given to _____.
- All attachments to this form are incorporated by this reference as though placed here in this form.
☐ Check here if attachments are included. There are _____ pages attached to this form.

I DECLARE UNDER THE PENALTY OF PERJURY UNDER THE LAWS OF THE STATE OF CALIFORNIA THAT THE FOREGOING IS TRUE AND CORRECT.

Date: _____

(TYPE OR PRINT NAME OF CONSERVATOR(S)/GUARDIAN(S))

(SIGNATURE OF CONSERVATOR(S)/GUARDIAN(S))

CONSERVATORSHIP/GUARDIANSHIP OF (Name):	CASE NUMBER:
---	--------------

PROOF OF SERVICE

1. I am over the age of 18 and am not a party in this case. I live or work in the county where the mailing occurred.
2. My (the server's) home or business address is _____

3. I served the Ex Parte Petition to Dispense with Accounting and Order on each person named below by putting a copy in a sealed envelope addressed as shown below AND

☐ depositing the sealed envelope with the United States Postal Service on the date and at the place shown in item 4 with the postage fully prepaid.

☐ placing the envelope for collection and mailing on the date and at the place shown in item 4 following our ordinary business practices. I am readily familiar with this business's practice for collecting and processing correspondence for mailing. On the same day that correspondence is placed for collection and mailing, it is deposited in the ordinary course of business with the United State Postal Service in a sealed envelope with postage fully prepaid.
4. Date mailed: _____ Place mailed (city, state) _____

I DECLARE UNDER PENALTY OF PERJURY UNDER THE LAWS OF THE STATE OF CALIFORNIA THAT THE FOREGOING IS TRUE AND CORRECT.

Date: _____

(Print Server's Name)

(Server Signs Name)

Name of Person	Address Where it Was Mailed
(CONSERVATEE/MINOR 12 OR OLDER)	

ORDER TO DISPENSE WITH ACCOUNT

THE COURT FINDS that the facts stated in the forgoing Ex Parte Petition to Dispense with Accounting are true.

THE COURT ORDERS THAT the Conservator/Guardian shall file a declaration in lieu of accounting annually so long as all the above conditions remain.

The next annual declaration will be filed on _____.

Date: _____

JUDICIAL OFFICER

☐ SIGNATURE FOLLOWS LAST ATTACHMENT

1. NOTICE is given that (name):
☐ Conservator ☐ Guardian of the estate of the above-named conservatee or ward, filed with the court a
☐ Partial No.: ☐ Final ☐ Supplemental ☐ Corrected ☐ Reappraisal for Sale
Inventory and Appraisal on (date filed): .
2. If you object to the *Inventory and Appraisal* identified above or to the appraised value of any property listed in it, and you want the court to hear your objections, they must be in writing, signed by you under penalty of perjury, and filed with the court at the court's address stated above. **If you object to the appraised value of any property listed in the *Inventory and Appraisal*, you must file your objections with the clerk of the court no later than 30 days after the date specified in item 1 above.**
3. If you object to a Final *Inventory and Appraisal* or to an *Inventory and Appraisal* filed on or after the later of (1) 90 days from the date of the order appointing the conservator or guardian or (2) the last day of any extension granted by the court for filing the *Inventory and Appraisal*, in addition to the objections described above you may also object to that *Inventory and Appraisal* and all others previously filed on the ground that they do not list property that should have been listed and valued as property of the estate.
4. You may prepare your written objections on **form GC-045, *Objections to Inventory and Appraisal of Conservator or Guardian***. When you file your objections, the court will set a date, time, and place for a hearing on them. Unless the court orders otherwise, you then must arrange for someone other than yourself to mail, at least 15 days before the hearing date, copies of your objections and copies of another form, **form GC-020, *Notice of Hearing—Guardianship or Conservatorship***, showing the date, time, and place of the court hearing, to (1) the conservator or guardian of the estate; (2) the conservator's or guardian's attorney, if any, at the address shown at the top of this form; (3) the conservatee or the minor (if the minor is at least 12 years of age; if not, to the minor's parents, guardian, or other adult residing with the minor who has legal custody); (4) the spouse or registered domestic partner of the conservatee or the spouse of the minor; (5) any person who has filed **form DE-154/GC-035, *Request for Special Notice***, in this case; and (6) any probate referee who made an appraisal of property to which you object. (You do not have to ask someone to mail copies to you if you are one of the persons listed above.) You must then arrange for the person who did the mailing to complete and sign the proof of service on page 2 of the original *Notice of Hearing* and file the *Notice* with the court before the date of the hearing.
5. At the hearing the court will consider and determine the merits of your objections and may fix the true value of any property to the appraised value of which you have objected. The court may order an independent reappraisal by one or more additional appraisers at the expense of the conservatorship or guardianship estate, **but if your objection to the appraisal of any property that the court orders to be reappraised is not upheld by the court, the cost of the reappraisal may be charged to you.**

Assistive listening systems, computer-assisted real-time captioning, or sign language interpreter services are available upon request if at least five days notice is provided. Contact the clerk's office for *Request for Accommodations by Persons With Disabilities and Order* (form MC-410). (Civ. Code, § 54.8.)



<input type="checkbox"/> CONSERVATORSHIP <input type="checkbox"/> GUARDIANSHIP OF THE <input type="checkbox"/> PERSON AND ESTATE OF (Name): _____ <div style="text-align: right;"><input type="checkbox"/> CONSERVATEE <input type="checkbox"/> MINOR</div>	CASE NUMBER: _____
--	--------------------

INSTRUCTIONS TO CONSERVATOR OR GUARDIAN

Each time you file an *Inventory and Appraisal* in this matter, you must complete this *Notice of Filing Inventory and Appraisal and How to Object to the Inventory or the Appraised Value of Property*. You, your attorney, or an employee of your attorney must mail copies of the completed *Notice* and court file-stamped copies of the filed *Inventory and Appraisal* to the conservatee, the attorney for the conservatee or ward, the conservatee's spouse or registered domestic partner, and the conservatee's first-degree relatives (parents and children) or, if none, to the conservatee's nearest relative. The person who does the mailing must complete and sign the proof of mailing below. You then must file the original *Notice* with the court.

PROOF OF MAILING

1. I am over the age of 18. I am the appointed conservator or guardian, the conservator's or guardian's attorney, or an employee of the attorney. I am a resident of or employed in the county where the mailing occurred.
2. My residence or business address is (*specify*): _____
3. I mailed the foregoing *Notice of Filing Inventory and Appraisal and How to Object to the Inventory or the Appraised Value of Property* on each person named below by enclosing a copy in an envelope addressed as shown below AND
 - a. ☐ **depositing** the sealed envelope with the United States Postal Service on the date and at the place shown in item 4 with the postage fully prepaid.
 - b. ☐ **placing** the envelope for collection and mailing on the date and at the place shown in item 4 following our ordinary business practices. I am readily familiar with this business's practice for collecting and processing correspondence for mailing. On the same day that correspondence is placed for collection and mailing, it is deposited in the ordinary course of business with the United States Postal Service in a sealed envelope with postage fully prepaid.
4. a. Date mailed: _____ b. Place mailed (*city, state*): _____
5. I mailed with this *Notice of Filing Inventory and Appraisal and How to Object to the Inventory or the Appraised Value of Property* a copy of the *Inventory and Appraisal* identified in item 1 on page 1 of this *Notice*, showing the date it was filed with the court.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: _____

(TYPE OR PRINT NAME OF PERSON COMPLETING THIS FORM)

(SIGNATURE OF PERSON COMPLETING THIS FORM)

NAME AND ADDRESS OF EACH PERSON TO WHOM NOTICE WAS MAILED

Name and relationship to conservatee or ward

Address (number, street, city, state, and zip code)

1.	Conservatee	
2.	Attorney for conservatee or ward	
3.	Spouse or registered domestic partner of conservatee	

☐ Continued on an attachment. (You may use form GC-042(MA) to show additional persons served.)