

ATTORNEY OR PARTY WITHOUT ATTORNEY(S)	Telephone Number	
Attorney for:		
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF MONTEREY</b> 1200 Aguajito Road, Monterey Division Monterey, CA 93940		
<input type="checkbox"/> Conservatorship <input type="checkbox"/> Guardianship of <input type="checkbox"/> Person <input type="checkbox"/> Estate of		
<b>Referral to Court Investigator</b>		<b>Case Number:</b>

**Complete and File With Initial Petition, Each Accounting, and When any Party Changes Residence**

**Note:** A fee may be assessed for Court Investigator Services – See Probate Code §1851.5

Hearing Date: \_\_\_\_\_

This referral is being sent to the Probate Investigator’s Office for an investigation regarding (check all that apply):

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Appointment                | <input type="checkbox"/> Accounting/ Review   | <input type="checkbox"/> Termination      |
| <input type="checkbox"/> Medical Powers             | <input type="checkbox"/> Dementia Powers      | <input type="checkbox"/> Other: (Specify) |
| <input type="checkbox"/> Sale of (former) Residence | <input type="checkbox"/> Substituted Judgment | _____                                     |

**Information about the (Proposed) CONSERVATEE:**

- **(proposed) Conservatee’s CURRENT address:**  
Address: \_\_\_\_\_  
Phone number: \_\_\_\_\_
- **(proposed) Conservatee’s HOME address:**  
Address: \_\_\_\_\_  
Phone number: \_\_\_\_\_
- **Birth Date:** \_\_\_\_\_
- **Social Security Number:** \_\_\_\_\_
- **Marital Status:**  Single/Divorced  Widowed  Married  Registered Domestic Partner
- **Special Needs (i.e. language)?** \_\_\_\_\_
- **Is (proposed) conservatee under an LPS Conservatorship now?**  Yes  No  
If yes, LPS #: \_\_\_\_\_
- **(Proposed) Conservatee’s Attorney (name):** \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone number: \_\_\_\_\_ Fax number: \_\_\_\_\_

(The reverse side may be used for additional information, if desired)

<i>Conservatorship of (Name):</i>	Case Number:
	General Hearing Date:

**Information about the (Proposed) CONSERVATOR:**

**All proposed Conservators must complete the information on this page. If there is more than one proposed Conservator, attach a copy of this page for each person.**

	Person	Estate
Name:	_____	_____
Address:	_____ _____	_____ _____
Daytime Phone:	_____ _____	_____ _____
Relationship to Conservatee/ward:	_____	_____
Date of Birth:	_____	_____
Social Security Number:	_____	_____
Driver's License Number:	_____	_____
Work Phone:	_____	_____
Cell Phone:	_____	_____
Attorney:	_____	_____
Attorney's Address:	_____	_____
Attorney's Phone:	_____	_____
Attorney's Fax:	_____ _____	_____ _____

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

Date: \_\_\_\_\_  
\_\_\_\_\_  
Signature of Proposed Conservator

Information sheet(s) for (number) \_\_\_\_\_ of (proposed) co-conservators is attached.

<i>Conservatorship of (Name):</i>	Case Number:
	General Hearing Date:

**Information about the (Proposed) Conservatee's Relatives & Friends:**

List the spouse or registered domestic partner, 1<sup>st</sup> and 2<sup>nd</sup> degree relatives (these are parents, children, brothers/sisters, grandparents and grandchildren), neighbors and close friends of the (proposed) conservatee.

- Name: \_\_\_\_\_
- Relationship to (proposed) Conservatee: \_\_\_\_\_
- Home Address: \_\_\_\_\_
- Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_ Cell phone: \_\_\_\_\_

- Name: \_\_\_\_\_
- Relationship to (proposed) Conservatee: \_\_\_\_\_
- Home Address: \_\_\_\_\_
- Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_ Cell phone: \_\_\_\_\_

- Name: \_\_\_\_\_
- Relationship to (proposed) Conservatee: \_\_\_\_\_
- Home Address: \_\_\_\_\_
- Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_ Cell phone: \_\_\_\_\_

- Name: \_\_\_\_\_
- Relationship to (proposed) Conservatee: \_\_\_\_\_
- Home Address: \_\_\_\_\_
- Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_ Cell phone: \_\_\_\_\_

- Name: \_\_\_\_\_
- Relationship to (proposed) Conservatee: \_\_\_\_\_
- Home Address: \_\_\_\_\_
- Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_ Cell phone: \_\_\_\_\_

- Name: \_\_\_\_\_
- Relationship to (proposed) Conservatee: \_\_\_\_\_
- Home Address: \_\_\_\_\_
- Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_ Cell phone: \_\_\_\_\_