

Information You Need for a Conservatorship Case

Your Information (Petitioner, Conservator)

- Full legal name, address, and phone number
- Date of birth, social security number, driver's license number
- Details about any bankruptcy case, if you had one, like the date of the bankruptcy order.
- Details about your criminal history, if you have one, like arrests, charges and convictions.

Helpful Documents Include:

- Social security card
- Driver's license
- Court documents (if any)

For you and anyone else who is asking to be a conservator

Information About the Person Needing Help (Conservatee)

- Full legal name, address, and phone number
- Date of birth, social security number, driver's license number
- Name, address and phone number of these relatives:
 - Parents
 - Brothers and sisters
 - Children
 - Spouse/registered domestic partner
 - Grandparents
 - Grandchildren

(If the person needing help does not have any of these relatives, you will need information about any step-parents, step-children, aunts, uncles, nephews, or nieces)

- Primary doctor name and address. Include a list of medical services received in the last 12 months.
- List of social services the person received in the last 12 months (such as housing help, public benefits, social work services)
- If the person is a client of a Regional Center, provide the name of Regional Center and case worker.
- Information regarding any power of attorney, trust or other document the person needing help already has.

Helpful Documents Include:

- Birth certificate
- Social security card
- Driver's license (if applicable)
- Regional Center reports (if any)
- Power of attorney or trust documents (if any)

For the person needing help

If you plan to ask the court to waive filing fees

- Financial condition of the person needing help, including public benefits received (like SSI and Medi-Cal).
- If the person receives no public benefits, state the total household income and number of household members.
- If the household income is more than the amount on the fee waiver form, you will need to show total household expenses, including payroll deductions and regular monthly expenses to cover the basic needs of the household.

Helpful Documents Include:

- Payment stubs from public benefits
- Payment stubs from employment
- Bills for basic expenses and utilities

For the person needing help, his or her spouse or partner and possibly for other household members