DECLARANT *(Name):* **TITLE:**
INSTITUTION *(Name):*
ADDRESS:
TELEPHONE: FAX *(Optional):*

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SUPERIOR COURT OF CALIFORNIA, COUNTY OF
STREET ADDRESS:
MAILING ADDRESS:
CITY AND ZIP CODE:
BRANCH NAME:

☐ GUARDIANSHIP ☐ CONSERVATORSHIP OF
(Name):
☐ MINOR ☐ CONSERVATEE

NO FILING FEE

NOTICE OF OPENING OR CHANGING A GUARDIANSHIP OR CONSERVATORSHIP ACCOUNT OR SAFE-DEPOSIT BOX

CASE NUMBER:

NOTE TO FINANCIAL INSTITUTION: When a guardian or conservator of the estate of a person opens or changes the name on an account or a safe-deposit box in a "financial institution" (a bank, a trust, a savings and loan association, a savings bank, an industrial bank, or a credit union), the institution must file a statement with the court having jurisdiction over the proceeding and identified in the *Letters of Guardianship* or *Letters of Conservatorship*. The statement must contain the information specified below concerning each new or existing account or safe-deposit box in the institution. The statement must be signed by an authorized officer of the institution.

1. I am an officer of the financial institution identified in this statement, and I am authorized to sign this statement on its behalf.
2. The guardian or conservator presented *Letters of Guardianship* or *Letters of Conservatorship* identifying the guardian or conservator of the estate of the ward or conservatee named above.
3. a. Financial institution *(name):*
   b. Branch *(name):*
   (street address):
   (city and zip code): *(telephone):*
4. ☐ Account status *(check one; identify additional new or existing accounts on Attachment 4):*
   a. ☐ (1) New account opened on *(date):* reflecting the guardianship or conservatorship.
      (2) Account number:
   b. ☐ (1) Existing account changed on *(date):* to reflect the guardianship or conservatorship.
      (2) Account number: Before change: After change:
      (3) Name on account before change *(state each name):*
   c. Opening balance of new account or balance of existing account immediately after change: $
5. ☐ Safe-deposit box status (*check one. Identify additional safe-deposit boxes on Attachment 5):*
   a. ☐ New box rented on *(date):* reflecting the guardianship or conservatorship.
   b. ☐ Existing box rental changed to reflect the guardianship or conservatorship on *(date):*
   c. New safe-deposit box number or current number after change:
   d. This institution ☐ has ☐ has not been given access to the safe-deposit box identified above.
   (If you checked "has," complete item 5e.)
   e. ☐ The contents of the safe-deposit box identified above are as follows *(list the contents in general terms, such as "currency, coins, jewelry, tableware, insurance policies or certificates, stock certificates, bonds, deeds, and wills"):*
6. Name of each person who opened or whose name was added to above-identified account or safe-deposit box *(state each name):*

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 AUTHORIZED OFFICER) (SIGNATURE OF AUTHORIZED OFFICER)

Form Adopted for Mandatory Use
Judicial Council of California
GC-051 [Rev. July 1, 2005]

Probate Code, § 2892
www.courtinfo.ca.gov

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