



CONSERVATORSHIP OF (Name):	Case number:
CONSERVATEE	

Asset Types	Value	Where Petitioner Obtained Information
g. Home, less encumbrances \$ _____		_____
h. Real Estate (not home) \$ _____		_____
i. Cash/Bank/Savings/CDs \$ _____		_____
j. Stocks/Bonds/IRAs \$ _____		_____
k. Other ( _____ ) \$ _____		_____
<b>I. TOTAL ASSETS</b>	<b>\$ _____</b>	

**3. Assessing Trust Assets and Annual Proceeds**

- a. Types of Assets in Trust: \_\_\_\_\_  
\_\_\_\_\_
- b. Estimated Value of Trust Assets: \$ \_\_\_\_\_
- c. Estimated Annual Receipts from Trust Assets: \$ \_\_\_\_\_

**4. Assessing Monthly Expenses**

	Amount	Where Petitioner Obtained Information
a. Rent/Mortgage/Home Insurance \$ _____		_____
b. Medical/Dental Costs/Insurance \$ _____		_____
c. Food/Utilities/Transportation \$ _____		_____
d. Care Providers \$ _____		_____
e. Other ( _____ ) \$ _____		_____
<b>f. TOTAL MONTHLY EXPENSES</b>	<b>\$ _____</b>	

**5. Expected Changes to Expenses and/or Income in the next 9 months (housing, care, etc.):** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I declare under penalty of perjury, under the laws of the State of California that, based upon information and belief, the foregoing is true and correct, and that I have retained a copy for my record.**

\_\_\_\_\_  
Dated

\_\_\_\_\_  
Signature of Conservator/Proposed Conservator

\_\_\_\_\_  
Type or Print Name

**File the original of this form with the Court and mail copies to the Probate Investigations Office at: 800 S. Victoria Ave, Ventura, CA 93009 and Public Defender's Office at: 800 S. Victoria Ave. Suite 207, Ventura, CA 93009.**