



## Start a Conservatorship Case

\$5.00

<b>What is this for?</b>	<p>This packet contains the paperwork you will need to open a <i>General</i> or <i>Limited</i> Conservatorship case.</p> <ul style="list-style-type: none"><li>▪ <i>General</i> – Conservatorship of an adult who cannot fully care for themselves, physically or financially.</li><li>▪ <i>Limited</i> – Conservatorships only for a developmentally disabled person whose disability was discovered before they turned 18 years old who cannot fully care for themselves, physically or financially.</li><li>▪ <i>Conservatee</i> - Person you want the court to put under the care of a conservator</li><li>▪ <i>Conservator</i> – Person(s) you want the court to order can make decisions for the conservatee’s care and protection.</li></ul>
<b>Step 1: Fill out the forms</b>	<p><a href="#">Notice of Hearing</a> (GC-020) <a href="#">Citation for Conservatorship</a> (GC-320) <a href="#">Petition for Probate Conservator</a> (GC-310) <a href="#">Confidential Supplemental Information</a> (GC-312) <a href="#">Confidential Conservator Screening Form</a> (GC-314) - one form needed for each proposed Conservator <a href="#">Duties of Conservator</a> (GC-348)</p> <p>Optional: <a href="#">Attachment Requesting Special Orders....</a> (GC-313)</p> <p><i>These forms must be filled out by the proposed conservatee’s doctor. They can be filed separately after the doctor has filled them out:</i> <a href="#">Capacity Declaration</a> (GC-335) Only filed if proposed conservatee has dementia: <a href="#">Attachment to Form GC-335</a> (GC-335A)</p>
<b>Step 2: Make copies</b>	<p>Take each form and make 2 copies. Paperclip and two-hole punch the <u>original</u> at the top. Do not staple the original. The copies may be stapled. Put the copies right behind each original.</p>



<p><b>Step 3: File the forms</b></p> <p><b>Filing fee</b></p>	<p>Get a number ticket for “Civil” at the kiosk on the 1st floor of the courthouse. File the forms with the clerk when your number is called. The court will file-stamp all your forms and give you back the 2 copies. You will keep a filed copy for your records and use the other copy to make more copies for the relatives who need to be given (“served”) copies of the forms.</p> <ul style="list-style-type: none"><li>▪ Citation for Conservatorship (GC-320)</li><li>▪ Petition for Probate Conservator (GC-310)</li><li>▪ Confidential Supplemental Information (GC-312)</li><li>▪ Confidential Conservator Screening Form (GC-314) - one form needed for each proposed Conservator</li><li>▪ Duties of Conservator (GC-348)</li><li>▪ And Capacity Declaration (GC-335) and Attachment to Form GC-335 (GC-335A) [if the doctor has already filled them out]</li></ul> <p>There is a \$435 fee to open a Conservatorship case. The court accepts cash, check, Visa, MasterCard, AMEX and Discover Card. If the proposed conservatee has no or low income, fill out the fee waiver forms to ask to not pay the court filing fee. The fee waiver is granted, or not, based on the proposed conservatee’s income and assets</p> <p>You may apply for a fee waiver by filling out and filing these forms:</p> <p><a href="#">Request to Waive Court Fees</a> (FW-001-GC) <a href="#">Order on Court Fee Waiver</a> (FW-003-GC)</p>
<p><b>Step 4: Serve copies of the forms</b></p>	<ul style="list-style-type: none"><li>▪ The proposed conservatee must be <b>handed</b> (“personally served”) with a copy of the Citation for Conservatorship (GC-320)</li><li>▪ Other close family members (see page 4) need to be <b>mailed</b> (“served by mail”) a copy of these filed forms:<ul style="list-style-type: none"><li>▪ Notice of Hearing (GC-020)</li><li>▪ Citation for Conservatorship (GC-320)</li><li>▪ Petition for Probate Conservator (GC-310)</li><li>▪ Attachment Requesting Special Orders.... (GC-313) [only if this form was filed]</li></ul></li></ul> <p>The person who serves the forms must be 18 or older and not involved (a “party”) in the case. You cannot serve the forms yourself.</p> <p>If you aren’t able to find the people you need to serve, please talk to Self-Help Center staff about your options.</p>
<p><b>Step 5: Fill out proofs of service</b></p>	<p>The person who serves the forms must fill out the 2<sup>nd</sup> page of the Notice of Hearing (GC-020) for people served by mail and the <a href="#">Proof of Personal Service of Notice of Hearing</a> (GC-020(P)) for people who were served in person.</p>



<b>Step 6: File the Notice of Hearing</b>	Make 1 copy of the Notice of Hearing (GC-020) and Proof of Personal Service of Notice of Hearing GC-020(P) and get a number ticket for “Civil” at the kiosk on the 1 <sup>st</sup> floor of the courthouse. When your number is called, hand the clerk the original and the copy. The clerk will file-stamp both and give you back the copy. Keep the filed copy for your records.
<b>Step 7: Court investigation</b>	While you are waiting for your court date, the court investigator will contact you. The investigator will write a report to the court stating if and why a conservatorship is necessary.
<b>Step 8: Check the court’s website</b>	Approximately one week before the court date, go to the court’s website: <a href="http://www.placer.courts.ca.gov">www.placer.courts.ca.gov</a> and check the “Tentative Rulings” link. Click on the “Conservatorship Notes” link for your hearing date. Find your case and review the notes/instructions. If you have questions about what the notes say, please make an appointment with the Self Help Center.
<b>Step 9: Come to your court hearing</b>	<b>Come to the court hearing the clerk wrote on your Notice of Hearing form.</b>  The Judge will sign these if orders are made at the court hearing: <a href="#">Order Appointing Probate Conservator</a> (GC-340) <a href="#">Letters of Conservatorship</a> (GC-350) Only if the conservatee has dementia: <a href="#">Attachment Requesting Special Orders....</a> (GC-313)

**Where can I get the forms?**

1. **For an app that helps you fill out the forms for a general or limited conservatorship, go to:**

<https://lawhelpinteractive.org/Interview/GenerateInterview/5394/engine>

- Click “Get Started”, then check the box to agree to the “Terms of Use” and click “Continue”
- Select either “Limited Conservatorship” or “General Conservatorship”, depending on what you are seeking
- Select “Placer” in the “County where you are filing your petition” dropdown menu.
- Answer the questions, save, your work, and at the end you can print out the forms.



2. **For an app that helps you fill out the forms for a limited conservatorship only, go to [caguideandfile.com](http://caguideandfile.com)**
  - Click “Start Your Legal Process”, then
  - Click “Requesting a Limited Conservatorship”
  - Answer the questions, save, your work, and at the end you can print out the forms.
3. The blank forms listed in these instructions can be found **online** at [www.courts.ca.gov/forms](http://www.courts.ca.gov/forms)
4. You can get the form packets through the court’s **Self-Help Center** or buy them at the **Court Clerk’s counter**.

### Where Can I Get Help?

- You can hire a private attorney for a free or low-cost consultation.
- If you do not have an attorney, you can get help from the court’s Self-Help Center located at the Gibson Courthouse, 10820 Justice Center Dr., Roseville. Online appointments and limited walk-ins are available Monday to Friday, 8:00 a.m. to 12:00 noon (Wednesday open until 3:00 p.m.). Schedule online appointments at [www.placer.courts.ca.gov](http://www.placer.courts.ca.gov) and search for **online appointments**.
- Visit [www.courts.ca.gov](http://www.courts.ca.gov)
  - Click “Self-Help” on the tabs and select “Seniors & Conservatorship” in the dropdown menu
- For Limited Conservatorship cases read:
  - [What is “Proof of Service” in a Guardianship Case?](#) (GC-510) – It’s for Guardianship cases but the rules are similar
  - Handbook for Conservators (<https://www.courts.ca.gov/documents/handbook.pdf>)

### What if decisions need to be made for the proposed conservatee on an immediate basis?

A judge can appoint a temporary conservator to take care of a proposed conservatee’s more immediate needs that cannot wait until a general conservator is appointed. Talk to a private attorney or the court’s Self-Help Center for more information.

### Which relatives need to be served with the forms?

*General Conservatorship* – The proposed conservatee’s parents, spouse or domestic partner, siblings, children.

*Limited Conservatorship* – The child’s parents, grandparents on both sides and any siblings over age 12.