



# 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> <p>Terms to Know:</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 to be allowed to 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) attached to the Petition (GC-310) if the proposed conservatee has dementia.</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 (do not staple) the <u>original</u>. The copies may be stapled. Put the copies right behind each original.</p> <p>Note: If you file electronically, copies are not required (see Step 3).</p>



<p><b>Step 3: File the forms</b></p> <p><b>eFiling</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. If you are filing at the Historic Courthouse in Auburn or the Tahoe Courthouse, you do not need to get a ticket. The court will file-stamp your forms, give you back the 2 copies, and issue the Citation (not filed in at this time). 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> <p>Alternatively, the Court has the option to file electronically through its eFile Service. For filing and more information, please visit <a href="http://placer.courts.ca.gov">placer.courts.ca.gov</a> and select “<a href="#">eFiling</a>” under the Online Services tab. This webpage contains instructions and FAQs to assist with the process. There is a service fee for eFiling paid to the third-party vendor and cannot be waived by the Court. Note: each form must be a separate PDF unless it contains attachments.</p> <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 below) may 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>Copies from eFiling may be printed from your eFiling account. 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><b>Which relatives need to be served with the forms?</b></p> <ul style="list-style-type: none"><li>- <i>General Conservatorship</i> – The proposed conservatee’s parents, spouse or domestic partner, siblings, children.</li><li>- <i>Limited Conservatorship</i> – The child’s parents, grandparents on both sides and any siblings over age 12.</li></ul>



<b>Step 5: Fill out proofs of service</b>	<p>The person who serves the forms must fill out the second 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> <p>The Proof of Service for the Citation for Conservatorship (GC-320) is on page 3 of that form.</p>
<b>Step 6: File the Citation and Notice of Hearing</b>	<p>Make 1 copy of the Citation for Conservatorship (GC-320), Notice of Hearing (GC-020), and Proof of Personal Service of Notice of Hearing GC-020(P) and file. The clerk will file-stamp the originals and give you back the copies. Keep the filed copies for your records.</p>
<b>Step 7: Court investigation</b>	<p>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.</p>
<b>Step 8: Check the court's website</b>	<p>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.</p>
<b>Step 9: Come to your court hearing</b>	<p><b>Go to your court date</b></p> <p>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)</p>

## Important Information and FAQ:

### Can I Access My Court Case Electronically?

Court users can now receive access to their file/orders electronically by three different methods:

Online Portal: You can come to the courthouse and show ID to gain access;

eFiling: If you check the box on eFiling, you will receive your orders via email; you will also receive portal access if you pay for a filing (so you do not need to come into the courthouse to show ID);



**eService:** You may consent to receive notice and orders by email. This can be done by submitting Judicial Council Form [EFS-005-CV](#).

### **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.

### **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", check the box to agree to "Terms of Use," 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, 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. Schedule a telephone or video appointment online at [www.placer.courts.ca.gov](http://www.placer.courts.ca.gov) and search for **online appointments** on the home page.
- Visit [www.courts.ca.gov](http://www.courts.ca.gov)
  - Click "Self-Help" 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>)
- Alta California Regional Center (ACRC)
  - The ACRC is a private, non-profit, corporation working under contract with the State of California, Department of Developmental Services, and provide services to people with “developmental disabilities.” This means someone who may have a physical, learning, language, or behavioral impairment. For more information on the services the ACRC can provide, please visit <https://www.altaregional.org> or call (916) 437-6900 for the Placer County Office.