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| <p>FOR PREPARATION BY THE COURT ONLY</p> <p>SUPERIOR COURT OF CALIFORNIA, COUNTY OF</p> <p>STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:</p> <p>CONSERVATORSHIP OF THE <input checked="" type="checkbox"/> PERSON <input checked="" type="checkbox"/> ESTATE of (name): _____</p> <p style="text-align: right;">CONSERVATEE</p> <p style="text-align: center;">ORDER APPOINTING COURT INVESTIGATOR (Review and Successor Conservator Investigations)*</p> <p><input checked="" type="checkbox"/> Conservatorship <input checked="" type="checkbox"/> Limited Conservatorship</p> | <p><i>FOR COURT USE ONLY</i></p> <p>CASE NUMBER: _____</p> |
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To (name):

You are hereby appointed court investigator in the matter above.

1. A review and investigation are required under Probate Code sections 1850 or 1850.5 and 1851.

YOU ARE DIRECTED TO:

- a. (1) Without prior notice to the conservator
 (2) After prior notice to the conservator because of necessity or to prevent harm to the conservatee, visit and inform the conservatee personally that the conservatee is under a conservatorship and give the name of the conservator to the conservatee.
- b. Make the determinations required by Probate Code section 1851(a)(1)(A)–(E).
- c. If you determine that the conservatee still meets the criteria for appointment of a conservator, determine whether the powers and duties of the conservator should be modified to ensure that the conservatorship is the least restrictive alternative needed for the conservatee's protection.
- d. Determine if the proposed conservatee is currently incapable of communicating, with or without reasonable accommodations, a desire to participate in the voting process and may be disqualified from voting under Elections Code section 2208 or, if previously disqualified, may have their voting rights restored under Elections Code section 2209.
- e. The court has made an order or orders under (select all that apply):
 - (1) Probate Code section 1873 (power of conservatee to enter into transactions).
 - (2) Probate Code section 1880 (conservatee's capacity to give informed consent to medical treatment).
 - (3) Probate Code section 1901 (conservatee's capacity to marry).
 Determine whether the current condition of the conservatee is such that the terms of the order or orders checked above should be modified or the order or orders revoked.
- f. To the extent practicable, review the conservator's accounting with the conservatee if the conservatee has sufficient capacity.
- g. Inform the court immediately if, at any time, you are unable to locate the conservatee.
- h. (If the conservator holds either of the powers granted under Probate Code section 2356.5(b)–(c)) (1) Advise the conservatee specifically that the conservatee has the right to object to the conservator's powers granted under section 2356.5; and (2) determine whether the conservatee objects to the conservator's powers under section 2356.5, whether the powers granted under section 2356.5 are warranted, and whether a change to those powers is warranted.
- i. (For limited conservatorship only) Recommend whether to continue, modify, or terminate the limited conservatorship.

* The court may use this form to order a review investigation and report, or to order an investigation and report for appointment of a successor conservator. The court may use *Order Appointing Court Investigator* (form GC-330) to order an initial or other investigation and report under Probate Code sections 1826, 1894, 2250.6, and 2253. See Cal. Rules of Court, rule 7.1060.

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| CONSERVATORSHIP OF THE <input type="checkbox"/> PERSON <input type="checkbox"/> ESTATE of (name): <div style="text-align: right;">CONSERVATEE</div> | CASE NUMBER: |
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1. j. (For a conservatorship existing on December 31, 1980, in which the conservatee has not been adjudged incompetent) Determine whether an order should be made under Probate Code section 1873 broadening the power of the conservatee.
- k. Certify your findings and determinations, including a statement of the facts on which the findings are based, in writing to the court and submit the report not less than 15 days before the date of review under Probate Code section 1850. Do not disclose confidential medical information or confidential criminal history information from the California Law Enforcement Telecommunications System (CLETS) in the body of your report. Place all such information in one or more separate attachments to the report.
- l. At the same time you certify and submit your report to the court, deliver copies in any manner authorized by Probate Code section 1215 to the conservatee, the conservator, and the attorneys of record for the conservator and the conservatee.
- m. Deliver copies of your report, modified to omit any attachment containing confidential medical information or confidential information from CLETS, to the conservatee's spouse or registered domestic partner and relatives within the first degree or, if there are no such relatives, to the conservatee's next closest relative, **except** for any person named in Attachment 1m because the court has determined that delivery to that person will harm the conservatee.
- n. Comply with the other orders specified on Attachment 1n.

2. **The court has ordered a review investigation**

- a. on its own motion.
- b. at the request of (name): _____, an interested person.

YOU ARE DIRECTED TO:

- c. Conduct a review investigation of the aspects of the conservatorship specified below, and report your findings and conclusions to the court no later than (date): _____

Continued in Attachment 2c.

