

# GUARDIAN AND CONSERVATOR WORKSHEET

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Turner Law, LLC  
Estate Planning and Administration  
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ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL.

IF POSSIBLE, PLEASE RETURN THE COMPLETED WORKSHEET TO OUR OFFICE 2 DAYS PRIOR TO YOUR APPOINTMENT VIA MAIL, FAX. or EMAIL.

**IF ADDITIONAL SPACE IS NEEDED FOR ANY SEPCIFIC ANSWER, PLEASE LIST ON ADDITIONAL SHEETS**

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**CLIENT INFORMATION SHEET**

Date: \_\_\_\_\_

Client Name: \_\_\_\_\_

Social Security number of Client: \_\_\_\_\_

Age: \_\_\_\_\_ Spouse/Parent or other: \_\_\_\_\_

Home Address including county: \_\_\_\_\_

\_\_\_\_\_ Length of time at as resident: \_\_\_\_\_

Mailing Address (if different) \_\_\_\_\_

\_\_\_\_\_

Telephone \_\_\_\_\_  
Numbers: (Home) \_\_\_\_\_ (Work) \_\_\_\_\_ (Cell/Pager) \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Employer: \_\_\_\_\_

Work Address: \_\_\_\_\_

\_\_\_\_\_

1. Conservatorship and Guardianship

(a) Name of Ward or Ward(s) \_\_\_\_\_  
(The WARD is the person in need of a guardian or Conservator)

\_\_\_\_\_

(b) Condition of proposed Ward \_\_\_\_\_ -

\_\_\_\_\_

(c)

Proposed Wards Family

Excluding the petitioner(s) and nominated conservator(s), indicate the Ward's nearest relatives whose whereabouts are known as follows: (show parents whose rights have not been terminated; if none, adult siblings of the Ward; if none the grandparents of the minor; if none any nearest relatives of the Ward so that three individuals are named)

Name	Address	Telephone No.	Relationship to Ward

Person nominated in writing as Guardian or Conservator for Ward:  
(For example, nominated by Will, Power of Attorney or Advanced Directive for Health Care)

VALUE

(d) Property of Ward(s)


**Please list assets on additional sheets if needed**  
Total \_\_\_\_\_

(d) Residence of Ward \_\_\_\_\_

(f) Social Security Number of the Ward(s) \_\_\_\_\_

(h) Income of Ward and Source \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

4. General:

Brief description of Issue: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

PROPOSED GUARDIAN OF THE WARD

NAME: \_\_\_\_\_

Home Address: \_\_\_\_\_

Social Security Number of the Conservator: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Employer: \_\_\_\_\_

Work Address: \_\_\_\_\_

Telephone \_\_\_\_\_

PROPOSED CONSERVATOR OF THE WARD

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NAME: \_\_\_\_\_

Home Address: \_\_\_\_\_

Social Security Number of the Conservator: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Employer: \_\_\_\_\_

Work Address: \_\_\_\_\_

Telephone  
Numbers:    \_\_\_\_\_                      \_\_\_\_\_                      \_\_\_\_\_  
                  (Home)                                      (Work)                                      (Cell/Pager)

Proposed Conservator Potential Financial Conflicts of interest with Ward: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_