

GUARDIAN AND CONSERVATOR WORKSHEET

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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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Turner Law, LLC

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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

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: _____
