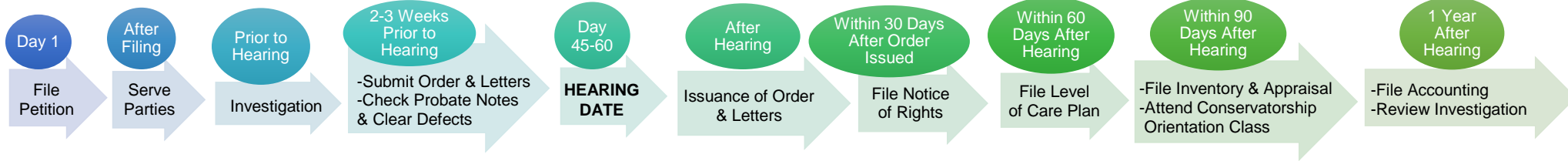




CONSERVATORSHIP TIMELINE



<p>After filing Petition:</p> <ul style="list-style-type: none"> All Conservatorships: Give Notice to all relatives listed in the petition (<i>at least 15 days before hearing</i>) and file Proof of Service (JC Form #GC-020). All Conservatorships: Serve Citation on proposed Conservatee (<i>at least 15 days before the hearing</i>) and file Proof of Service (JC Form #GC-320). Limited Conservatorships only: Give Notice to Regional Center (<i>at least 30 days before hearing</i>) and file Proof of Service (JC Form #GC-020). If the proposed conservatee receives benefits from the Veterans Administration (VA), give notice to the VA (<i>at least 15 days before hearing</i>) and file Proof of Service (JC Form #GC-020). <p>Prior to hearing:</p> <ul style="list-style-type: none"> General Conservatorships: You will be contacted by a Court Investigator. Limited Conservatorships: You will be contacted by a Court Appointed Attorney. Limited Conservatorships: Regional Center will need to assess the proposed conservatee and prepare a report. Contact Regional Center at 858-576-2996 for further instructions. <p>3 weeks prior to hearing:</p> <ul style="list-style-type: none"> Submit the Order Appointing Probate Conservator (JC Form #GC-340), Letters of Conservatorship (JC Form #GC-350), Submitted Order Coversheet (SDSC Form #PR-162) and a self-addressed and stamped envelope to the Probate Business Office. <p>NOTE: <i>If filing for Conservatorship of the Estate and your petition requests that bond be posted, submit the Bond with the Order & Letters.</i></p> <p>2 weeks prior to hearing:</p> <p>Review Probate Examiner Notes and clear defects. Information regarding the Probate Examiner Notes can be found on the court's website at www.sdcourt.ca.gov.</p>	<p>Hearing:</p> <ul style="list-style-type: none"> If there are no defects and no one objects, the Judge will make an order and appoint the conservator. If there are defects at the hearing or if someone objects, there may be a continuance to allow time to correct the defects and/or allow time for written objections/response to objections to be filed. <p>After hearing:</p> <ul style="list-style-type: none"> Once the court grants your Petition, the Order & Letters that were submitted 3-weeks prior to the hearing will be reviewed for accuracy and returned to you. <p>Within 30 days after Order issued:</p> <ul style="list-style-type: none"> All Conservatorships: Serve the Notice of Conservatee's Rights (JC Form #GC-341) on the Conservatee and all relatives listed in the petition. File a copy with the Proof of Mailing completed on page 3. <p>Within 60 days after hearing:</p> <ul style="list-style-type: none"> Conservatorships of the Person: File the Determination of Conservatee's Appropriate Level of Care (JC Form #GC-355). <p>Within 90 days after hearing:</p> <ul style="list-style-type: none"> Conservatorships of the Estate: File an Inventory & Appraisal (JC Form #DE-160/GC-040). General Conservatorships: If ordered by the court, attend the Conservatorship Orientation Class and file proof of attendance with the court. A list of providers can be found on the court's website at www.sdcourt.ca.gov. <p>1 year after hearing:</p> <ul style="list-style-type: none"> All Conservatorships: A review investigation will be conducted by the Court Investigator to ensure the needs of the Conservatee are being met. After this investigation the Court Investigator will return biennially (every other year). These visits may be unannounced. Conservatorships of the Estate: File an accounting. After the first accounting, further accountings will be required biennially (every other year), unless the court directs otherwise. 	<p>Change in Contact Information:</p> <ul style="list-style-type: none"> All Conservatorships: If the Conservator or Conservatee moves residences the court must be notified in writing. <ul style="list-style-type: none"> ✓ Conservator: You must file the Notice of Change of Address or Other Contact Information (JC Form #MC-040) with the Probate Business Office. ✓ Conservatee: You must file the Pre-Move Notice of Proposed Change of Personal Residence of Conservatee or Ward (JC Form #GC-079) with the Probate Business Office prior to the physical move of the Conservatee. Once the conservatee has physically moved to the new residence, you must file the Post-Move Notice of Change of Residence of Conservatee or Ward (JC Form #GC-080). All Conservatorships: If the Conservator or Conservatee change telephone numbers you must notify the court by filing the Notice of Change of Address or Other Contact Information (JC Form #MC-040) indicating the new telephone number. <p>Death of Conservatee:</p> <ul style="list-style-type: none"> All Conservatorships: Upon death of the Conservatee you must complete and file the Notice of the Conservatee's Death (JC Form #GC-399). You must also serve a copy on all relatives listed in the petition for appointment. <p>NOTE: <i>If the conservatorship is of the person only, no further action is required after the Notice of the Conservatee's Death has been filed.</i></p> <ul style="list-style-type: none"> Conservatorships of the Estate: File final accounting.
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Note: *These are approximate days. Check your hearing date for accuracy. Also, see **Duties of Conservator and Acknowledgment of Receipt of Handbook for Conservators** ([JC Form #GC-348](#)) for more information.*

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