



County of Inyo
Office of Public Guardian/Patricia Barton
1360 N Main Street, Suite 220
Bishop, California 93514
Phone: (760) 873-5894 Fax: (760) 873-8835

REQUEST FOR PROBATE CONSERVATORSHIP INVESTIGATION

Referring Agency or Individual:

Name			
Address			
Phone		Email	

Client Information:

Name		DOB	
Current Address			
Home Address			
Phone Number		SSN	
Medicare/Medical/Insurance		DL Number and State	
Marital Status		Religion	
Usual Occupation		Veteran	
Doctor		Last Appt Date	

Spouse, Relatives, Friends, Neighbors, any contacts made:				
Name	Relation	Address	Phone #	Have you made contact?

Income:	
Source (Social Security, Retirement, etc.)	Monthly Amount

Assets: (Please include approximate value and location of asset)			
Real Property	Household Items	Vehicles	Mobile Home
Bank Accounts	Life Insurance	Stocks/Bonds	Other

Medications & Dosage:		

Please Answer the Following:

Reason for referral?	
How did you become aware of these problems?	
What is this person's ability to provide properly for personal needs?	
What is this person's ability to manage own financial resources?	
What alternatives to conservatorship have been considered?	
What Health and Social Services have been provided to this individual during the last year?	
What estate management or money management services have been provided to this person?	
In seeking assistance for this person, what other agencies have you contacted?	
Does this person have psychiatric history?	