

COURT INVESTIGATOR'S OFFICE
BERKELEY COURTHOUSE
2120 MARTIN LUTHER KING, JR. WAY
BERKELEY, CA 94704

SUPERIOR COURT - ALAMEDA COUNTY

**STATUS REPORT ON CONSERVATEE
(Local Court Rule 7.870)**

In the Matter of the Conservatorship of:)
)
)
_____, Conservatee)

PROBATE NUMBER:

HEARING DATE:

THIS IS A CONFIDENTIAL REPORT

CONFIDENTIAL STATUS REPORT

Name of Conservatee: _____ Probate No.: _____

Current Residence: _____

Phone: _____

Please provide the following information about the conservatee.

1. Current Health Status -

a) Doctor's Name: _____ Date of last appointment: _____

b) Describe conservatee's current health status, including diagnoses. _____

c) Describe any significant health changes since the last review. _____

2. Current Function Level -

a) Describe conservatee's ability to care for self _____

b) Describe conservatee's communication/understanding level _____

c) Describe any significant changes in the conservatee's ability to care for self or communicate/understand since the last review. _____

3. Current General Well Being -

a) Describe the current living situation (own home/board & care/skilled nursing/etc.) _____

b) If the conservatee lives at home, does he/she receive IHSS benefits? _____

If, yes, name of care provider _____ Phone _____

Name of social worker at IHSS _____ Phone _____

c) Describe any plans to change the living situation _____

d) Date of last visit by conservator _____

Frequency of visits by conservator _____

Does the conservatee have other visitors? _____

4. Current estate situation -

a) Present market value _____

b) Adequate to meet needs of the conservatee _____

Explain _____

c) If you plan to make significant changes in the way the estate is being handled, please describe them. (e.g., a reverse annuity mortgage in order to keep the conservatee in own home). _____

5. Name and phone no. of Day Program, if applicable _____

6. Conservator's comments - Please indicate any unusual problems/successes you wish the court to be aware of that occurred since the last review. _____

I declare under penalty of perjury that the foregoing is true and correct.

Date signed: _____

Conservator's Signature _____

Mailing Address _____

City, State, Zip Code _____

Telephone Number/Email address _____

*Attach additional pages if necessary.