



4. How often do you expect to visit the Conservatee? \_\_\_\_\_

5. Do you plan to request conservator fees at the end of the first year?  
\_\_\_\_\_ No \_\_\_\_\_ Yes (anticipated amount of request) \$ \_\_\_\_\_

**6. Conservatee's Estimated Monthly Income**

Social Security/SSI	\$ _____	Dividends	\$ _____
Pension (source) _____	\$ _____	Rental	\$ _____
Veteran's benefits	\$ _____	Interest	\$ _____
Other (specify) _____			\$ _____
Total Estimated Monthly Income			\$ _____

**7. Conservatee's Estimated Monthly Expenses**

**LIVING EXPENSES**

Rent/Mortgage	\$ _____	Utilities	\$ _____
Nursing/Care Home	\$ _____	In-home care	\$ _____
Food	\$ _____	Clothing	\$ _____
Medical/Dental	\$ _____	Medications	\$ _____
Transportation	\$ _____	Entertainment	\$ _____
Other (specify) _____			\$ _____
Total Estimated Monthly Expenses			\$ _____

**8. Other Expenses**

**TAXES**

	Current		Estimated Amount
Income Tax	___ Yes	___ No	\$ _____
Property	___ Yes	___ No	\$ _____
Payroll	___ Yes	___ No	\$ _____

**INSURANCE**

	Company	Coverage Amount	Estimated premium
Homeowner	_____	\$ _____	\$ _____
Renters	_____	\$ _____	\$ _____
Automobile	_____	\$ _____	\$ _____

Worker's Comp	_____	\$ _____	\$ _____
Health	_____	\$ _____	\$ _____
Life	_____	\$ _____	\$ _____

Does the Conservatee receive Medi-Cal benefits?

\_\_\_\_\_ No    \_\_\_\_\_ Yes    \$ \_\_\_\_\_ share of cost

9. Do you expect to sell any of the Conservatee's real or personal property in the next year?    \_\_\_\_\_ No    \_\_\_\_\_ Yes

If yes, explain why: \_\_\_\_\_

10. Does the conservatee own a home in which he/she does not live?  
\_\_\_\_\_ No

\_\_\_\_\_ Yes. Is it rented? Amount of rent: \$ \_\_\_\_\_

If not rented explain why: \_\_\_\_\_

11. If the conservatee's monthly expenses are greater than monthly income, explain how the shortfall will be met:

\_\_\_\_\_

12. Does the conservatee have a trust or is he/she entitled to receive income from a trust? \_\_\_\_\_

If so, please provide an attachment with the name of the trust, any court case number for the trust, the name(s) of the trustee(s) and their contact information.

\_\_\_\_\_

13. Do you anticipate any unusual activities related to the management of the conservatee's estate during the next year?

\_\_\_\_\_ No

\_\_\_\_\_ Yes (explain)

\_\_\_\_\_

The undersigned conservator will:

- a. Inventory all assets in which the conservatee has any interest;
- b. Render timely, accurate and complete accountings to the court;
- c. Carry out all mandatory usual and general duties of a conservator;
- d. Maintain accurate records related to the estate;
- e. Maintain all estate assets in a separate identifiable manner;
- f. Maintain estate cash assets in interest-bearing accounts, except as necessary for everyday administration;
- g. Maintain an adequate surety bond as required by law.
- h. Refer to the "Conservator's Handbook".

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that I have retained a copy of this case plan for my records.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Signature of Conservator(s)

\_\_\_\_\_  
Type or print name(s)