

Time Line & Checklist For Conservatorship

	30 days before hearing/ 15 days for ltd c'ship	1 week before hearing	4 wks after filing/ 6-8 wks for ltd conservatorship	w/in 60 days from hearing	w/in 90 days from hearing	120 days from hearing	w/in 6 months from hearing	1 Year from hearing
File Petition	Give Notice, Serve Citation, File Proof of Service	Probate Examiner Notes	Hearing File Orders & Letters if Appointed	File Level of Care Plan	Give Notice of Rights & file Proof of Service, File Inventory & Appraisal	Review Hearing	Take Orientation Class, File Proof of Attendance	File Accounting for c'ship of Estate, Court Investigator Report
<p>Immediately after filing:</p> <p><input type="checkbox"/> For limited conservatorship only: Give Notice to Regional Center and file Proof of Service (at least 30 days before hearing).</p> <p><input type="checkbox"/> All Conservatorships: Give Notice to 2nd degree Relatives (at least 15 days before hearing) and file Proof of Service.</p> <p><input type="checkbox"/> Give Notice to Veterans Administration if VA applies to proposed conservatee (at least 15 days before hearing) and file Proof of Service.</p> <p><input type="checkbox"/> Serve Citation on proposed Conservatee (at least 15 days before the hearing) and file Proof of Service.</p> <p><input type="checkbox"/> Approx. 7-10 days after filing petition expect Court Investigator visit.</p>		<p><input type="checkbox"/> Expect Court Appointed Attorney's visit.</p> <p><input type="checkbox"/> Regional Center assessment (for limited conservatorship only).</p> <p><input type="checkbox"/> 1 week before the hearing, check Probate Examiner notes and discuss issues with Probate Examiners. (Sometimes these notes are available only 1 day before the hearing.)</p> <p>At the hearing:</p> <p><input type="checkbox"/> If there are no defects and no one objects, the Judge will make an order and appoint the conservator.</p> <p><input type="checkbox"/> If there are defects at the hearing or if someone objects, there will be a continuance. Cure the defects and address the objections before the next hearing date.</p>		<p><input type="checkbox"/> After Judge makes an order approving the petition and appointing the Conservator: file the Orders and Letters.</p> <p><input type="checkbox"/> Within 60 days from appointment/hearing: File Level of Care Plan for Conservatorship of Person.</p> <p><input type="checkbox"/> Within 90 days from appointment: Mail Information Notice of Conservatee's Rights and file Proof of Service.</p> <p><input type="checkbox"/> Within 90 days from appointment: File inventory and appraisal, for Conservatorship of Estate.</p> <p><input type="checkbox"/> 120 days from appointment: there will be a review hearing set, which will be vacated if you are in compliance with all the filing requirements. However, if you are not in compliance you will have to come to the review hearing and show good cause why the Court should not remove you as Conservator, sanction or fine you.</p>		<p><input type="checkbox"/> Within 6 months from appointment: Attend and file proof of attendance of conservatorship orientation class (not for limited conservatorship of person) (Local Court Rule)</p> <p><input type="checkbox"/> After 6 months from appointment and again 6 months later and then every Year.</p> <p><input type="checkbox"/> 1 year from Appointment: File an accounting, for Conservatorship of Estate. An accounting will be due for Conservatorship of the Estate annually and the court will set review hearings for the accountings.</p>		