



Superior Court, County of Ventura

NOTICE

October 8, 2020

Effective Immediately

Pursuant to Ventura Superior Court Administrative Order No. 20.34, with new petitions for any type of conservatorship submitted for filing, the petitioner shall complete and file a confidential Preliminary/Interim Financial Declaration using “proposed” local form VN262 or a self-drafted form that includes the same information contained in the proposed form.

VENTURA
SUPERIOR COURT
FILED

SEP 21 2020

MICHAEL D. PLANET
Executive Officer and Clerk
BY:  Deputy

**SUPERIOR COURT OF THE STATE OF CALIFORNIA
FOR THE COUNTY OF VENTURA**

Administrative Order No. 20.35

ADMINISTRATIVE ORDER NO. 20.35

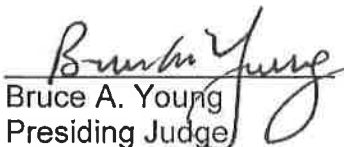
Re: Filing of Preliminary/Interim
Financial Declaration in Probate
Conservatorships

At the time of submission for filing of any type of petition for probate conservatorship, (including a temporary conservatorship) or upon order of the court, the petitioner shall complete and file a confidential Preliminary/Interim Financial Declaration. Petitioner may use "proposed" Ventura Superior Court Local form VN262 "Preliminary/Interim Financial Declaration," (copy attached hereto) pending formal adoption by the judges of the Superior Court or a self-drafted form that includes the information set out in proposed Local form VN262.

Good cause appearing, this information is required to allow the court to identify non-indigent proposed or current conservatees that are to be represented by an attorney that is part of the court's Private Counsel Panel and not the Ventura County Public Defender.

This order shall automatically expire on January 1, 2021, unless extended by the court.
IT IS SO ORDERED.

Dated: September 21, 2020.


Bruce A. Young
Presiding Judge

CONFIDENTIAL

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name and Address) Telephone Number E-MAIL ADDRESS (Mandatory): ATTORNEY FOR (Name):	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF VENTURA Juvenile Courthouse 4353 Vineyard Ave Oxnard, CA 93036	
IN THE MATTER OF:	
CONSERVATORSHIP PRELIMINARY/INTERIM FINANCIAL DECLARATION Ventura Superior Court Local Rule 10.02.####	CASE NUMBER:

Note: If additional space is needed, please attach additional page(s).

1. General Information Regarding the Conservatorship and Conservatee/Proposed Conservatee

- a. Type of Conservatorship (Check all that apply): Person _____ Estate _____ General _____ Limited _____
- b. (Proposed) Conservatee's Age _____ and DOB: _____ c. In a 10-Year Plus Marriage (Y/N) _____
- d. Possible Major Neurocognitive Disorder (Y/N) _____
- e. Possible Developmental Disability (Y/N) _____ f. Is a Regional Center Client (Y/N) _____
- g. Diagnoses: _____

- h. Shortened life expectancy (Y/N) _____ If YES, briefly explain _____

- i. (Proposed) Conservatee has Advanced Health Care Directive (Y/N) _____ Approx. AHCD Date: _____
- j. (Proposed) Conservatee has a Trust (Y/N) _____ Approx. Trust Date: _____
- k. Owns home living in now (Y/N) _____ l. Relationship of (Proposed) Conservator _____

2. Assessing Annual Personal/Conservatorship Income and Assets

Income Source	Amount	Where Petitioner Obtained Information
a. Pension	\$ _____	_____
b. Social Security	\$ _____	_____
c. Rents	\$ _____	_____
d. Dividends	\$ _____	_____
e. Other (_____)	\$ _____	_____
f. TOTAL ANNUAL INCOME	\$ _____	

CONSERVATORSHIP OF (Name):	Case number:
CONSERVATEE	

Asset Types	Value	Where Petitioner Obtained Information
g. Home, less encumbrances \$ _____		_____
h. Real Estate (not home) \$ _____		_____
i. Cash/Bank/Savings/CDs \$ _____		_____
j. Stocks/Bonds/IRAs \$ _____		_____
k. Other (_____) \$ _____		_____
I. TOTAL ASSETS	\$ _____	

3. Assessing Trust Assets and Annual Proceeds

- a. Types of Assets in Trust: _____

- b. Estimated Value of Trust Assets: \$ _____
- c. Estimated Annual Receipts from Trust Assets: \$ _____

4. Assessing Monthly Expenses

	Amount	Where Petitioner Obtained Information
a. Rent/Mortgage/Home Insurance \$ _____		_____
b. Medical/Dental Costs/Insurance \$ _____		_____
c. Food/Utilities/Transportation \$ _____		_____
d. Care Providers \$ _____		_____
e. Other (_____) \$ _____		_____
f. TOTAL MONTHLY EXPENSES	\$ _____	

5. Expected Changes to Expenses and/or Income in the next 9 months (housing, care, etc.): _____

I declare under penalty of perjury, under the laws of the State of California that, based upon information and belief, the foregoing is true and correct, and that I have retained a copy for my record.

Dated

Signature of Conservator/Proposed Conservator

Type or Print Name

File the original of this form with the Court and mail copies to the Probate Investigations Office at: 800 S. Victoria Ave, Ventura, CA 93009 and Public Defender's Office at: 800 S. Victoria Ave. Suite 207, Ventura, CA 93009.