ATTORNEY OF RECORD: TO BE COMPLETED BY THE CONSERVATOR AND FILED THIRTY DAYS PRIOR TO THE GENERAL PLAN HEARING DATE. THE CONSERVATOR SHOULD RETAIN A COPY. A COPY OF THE PLAN AND INVENTORY AND APPRAISMENT MUST BE SENT TO THE COURT INVESTIGATORS OFFICE.

## SUPERIOR COURT OF CALIFORNIA COUNTY OF ALAMEDA

Conservatorship of the (person/and/estate) of ()		Probate No.  CONSERVATORSHIP GENERAL PLAN					
							conservatee)
Plar		_, the conservator(s) of the person/estate of _ hereby submits the conservator's General Rules.					
1.	Conservatee Information: Name:						
	Date of Birth:						
	Social Security Number:						
2.	Address:						
	Telephone:						
3.	Conservatee's residence:						
	_own home/apartment	conservator's home/apartment					
	_skilled nursing home	board and care home					
	hospital (medical/psychiatric)	other (specify)					

How long has the Conservatee be	een in the present res	sidence?
Do you anticipate making any chyear?NoYes		
Please note that the Court Inves address.	tigator's Office must	be notified of any change of
4. Current level of care:requires total careable to do own careambulatoryurinary/bowel incontinence Other relevant information	has fe uses v has a	wheelchair/walker catheter
5. Conservatee's physical ain good healthconfusion/disorientationmemory losstakes regular medications Please list health problems	is developme unable to rea deaf or comm (describe)	entally disabled ad/write nunication problem
How often does the Conservatee Doctor's name  Are any other health providers invvisiting nursepodiatristcounselorspeech therapist	volved?No social worke dentist	Yes er erapist
<ul><li>6. How often do you expect</li><li>7. Will other family or friend</li></ul>	t to visit the Conser	
8. <b>Do you plan to request c</b> No Yes (anticip		•
conservatorship of the p	erson only)	me (complete even if a
Pension (source) \$\$	Rental	\$
Veteran's benefits \$	Interest	\$
Other (specify)		\$
Total Estima	ated Monthly Income	\$

10.		's Estimated ship of the pe		Expenses	(complete	e even	if a
LIVIN	IG EXPENSES						
	Rent/Mortgag	е	\$	Utilities	Ç	\$	
	Nursing/Care	Home	\$	In-home o	are S	\$	
	Food		\$	Clothing	Ş	\$	
	Medical/Denta	al	\$	Medication	ns S	\$	
	Transportatio	n	\$	Entertainn	nent S	\$	
	Other (specify	/)			Ş	\$	
		Total Estimate	ed Monthly I	Expenses	\$		
11.	Other Expen	ses					
TAXI	ES Income Tax Property Payroll	Currer Ye Ye	sl sl	Estimated No \$ No \$ No \$			
INSL	JRANCE						
Compar Homeowner Renters Automobile Worker's Comp Health Life		Company (	Coverage Ai \$\$ \$\$ \$\$ \$\$ \$\$ \$\$	mount Estin _			
Does	the Conservate	ee receive Me			ost		
12.	property in the	pect to sell e next year? why:	No	Ye	es	or per	sonal -
13.		ervatee own a Yes If \ explain why: _	es, is it re	ented?	Amount of		<b>)</b>
	If the conservat	•	•	e greater tha	n monthly ir	ncome,	
fr	Does the consom a trust?	lf so, pleas	se provide a	n attachment	t with the na	me of	- come

and their contact information. 16. Do you anticipate any unusual activities related to the management of the conservatee's estate during the next year? \_\_\_\_\_Yes (explain)\_\_\_\_\_ No The undersigned conservator will: Inventory all assets in which the conservatee has any interest; a. b. Render timely, accurate and complete accountings to the court; C. Carry out all mandatory usual and general duties of a conservator; d. Maintain periodic contract with the conservatee's physician and other health care providers, if appointed conservator of the person; Maintain periodic contract with the conservatee's family and friends, if e. applicable; f. Be available to the conservatee on a 24-hour basis for emergencies, or arrange for such coverage by a qualified agent; Maintain accurate records related to the estate; g. h. Maintain all estate assets in a separate identifiable manner; i. Maintain estate cash assets in interest-bearing accounts, except as necessary for everyday administration; Maintain an adequate surety bond as required by law. j. k. Update case plan as needed. Refer to the "Conservator's Handbook". I. 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)

Rev: 9/06; Ct. Inv.

Type or print name(s)