

10. **Conservatee's Estimated Monthly Expenses (complete even if a conservatorship of the person only)**

LIVING EXPENSES

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

11. **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

12. Do you expect to sell any of the Conservatee's real or personal property in the next year? ___ No ___ Yes
If yes, explain why: _____

13. Does the conservatee own a home in which he/she does not live?
___ No ___ Yes If Yes, is it rented? ___ Amount of rent: \$ ____
If not rented explain why: _____

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

15. 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.

16. 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 periodic contract with the conservatee's physician and other health care providers, if appointed conservator of the person;
- e. Maintain periodic contact with the conservatee's family and friends, if applicable;
- f. Be available to the conservatee on a 24-hour basis for emergencies, or arrange for such coverage by a qualified agent;
- g. Maintain accurate records related to the estate;
- 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;
- j. Maintain an adequate surety bond as required by law.
- k. Update case plan as needed.
- l. 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)

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