



**SUPERIOR COURT OF THE STATE OF CALIFORNIA
 COUNTY OF SAN MATEO
 PROBATE COURT INVESTIGATIONS
 400 County Center, 2nd Floor, SMC-127 PI
 Redwood City, CA 94063**

**CONFIDENTIAL STATUS REPORT
 Status Report of Conservatee Pursuant to Local Court Rule 4.81.18**

NOTE: If there is more than one conservator, only one Status Report must be completed. Each co-conservator must sign the Status Report or attach a separate signature page that, when signed indicates agreement to the contents of the Confidential Status Report. The Confidential Status Report is also available online at www.sanmateocourt.org.

Please type or print legibly when completing this document.

1. Conservatee's Name: _____

2. Case Number: _____ Date of Birth: _____ Age: _____

3. Name of Facility (if applicable): _____

4. Facility or Home Address: _____
Street

City Zip

5. Phone: _____ Facility Contact: _____

6. Type of Residence/Facility: _____
 (Nursing Home, Residential Care, Assisted Living, Private Home)

7. What is date of placement? Describe facility services and medical monitoring of conservatee? Do you plan to continue placement or change placement?

8. Current health status/functional level: stable declined improved

Primary Diagnosis: _____

Comments: _____

9. Hospitalizations during the review period? Yes No If yes, list dates and reasons for hospitalizations:

10. **DAY PROGRAM** - If the conservatee attends a day program such as a vocational program, sheltered work program, adult day health program or any other day program, please complete the following information:

Program Name: _____

Address: _____

Phone: _____ Contact person: _____

Days attended: _____ Hours: _____

Program services and activities: _____

C. Conservator of Estate, complete the following section:

For a Conservatorship of the Estate, an accounting is required unless waived by the Court pursuant to Section 2628 of the Probate Code. If waived, a **Declaration in Support of Waiver of Accounting (Local Form Number PR-24)** must be filed each review period.

If an accounting is being filed, complete the following information: (Use additional sheets of paper if necessary.)

Total current fair market value (FMV) of estate: _____

Total average monthly income: _____

Total average monthly expenses: _____

1) Explain any “internal accounting adjustments” not otherwise delineated in the accounting:

2) Describe any unusual receipts or disbursements, sales, purchases or changes in the form of assets not otherwise delineated in the accounting. Address any unusual compensation paid to third parties, especially if they are relatives of the conservatee or the conservator. *(For example, if the monthly phone bill averages \$50.00, explain a phone bill of \$250.00; or, if a rental property earns gross monthly rent of \$2,500.00, explain why the listed net rent is \$2,275.00.)* **Use additional sheets, if necessary.**

13. **Current Issues:** Conservator’s personal observations and compliance with Court orders and recommendations; also include information regarding any criminal matters or civil litigation involving the conservatee or conservator.

14. Name of person completing this document: _____

15. I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on _____ at _____
Date Location

Conservator Signature: _____

Print Name: _____

I am a co-conservator in this matter and I have read the Confidential Status Report of Conservatee and know the contents thereof. The report is true of my own knowledge and understanding.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on _____ at _____
Date Location

Co-Conservator Signature: _____

Print Name: _____

Please mail completed form and one additional copy, at least thirty (30) days prior to the review hearing date, to:

Superior Court, County of San Mateo
Probate Clerk's Office
400 County Center, 1st Floor
Redwood City, CA 94063-1655