

THE HERITAGE LAW GROUP

Susan I. Jean & Associates, PC

GUARDIANSHIP / CONSERVATORSHIP  
QUESTIONS

Your name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Email: \_\_\_\_\_  
Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_

Your are looking for:  
 Guardianship (control over residential/medical decisions)  
 Conservatorship (control over finances)  
 Both

Person needing G/C: \_\_\_\_\_  
Address: \_\_\_\_\_  
(If they have lived in Virginia for less than 6 months, provide previous address too)

Phone: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Your relationship: \_\_\_\_\_  
This person has (bring documents to appointment):  
 Durable power of attorney  
 Living will or medical power of attorney  
 Trust

What medical issue is causing your concern?

Why are you seeking G/C?

Do you think someone will contest your request for G/C?  Yes  No

If capacity is an issue, it would be helpful for you to bring to the appointment an informal letter from his or her physician stating mental capacity / competency (not necessary for consult, but preferred. We will need it if retained.)

How did you hear about us? \_\_\_\_\_  
If you were referred by an individual, may we thank him or her?  Yes  No

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Name:

Date:

Name of Financial Institutions	Solely Owned by person needing G/C	Joint with another person	Beneficiary (if known)
Checking, Saving, Money Market, Accounts, CDs			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Stocks & Bonds, Brokerage Acc'ts, Mutual Funds, Investments			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Tax-qualified accounts (IRAs, 401(k)s, tax-qualified annuities, etc.)			
	\$	n/a	
	\$	n/a	
	\$	n/a	
	\$	n/a	
	\$	n/a	
	\$	n/a	

	Person needing G/C	Joint with another person	Beneficiary (if known)
Real Estate (estimate fair market value - you can note mortgages under "debt")			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Life insurance - death benefit values			
	\$	n/a	
	\$	n/a	
	\$	n/a	
	\$	n/a	
Vehicles, boats, items of unusual value, etc.			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
Business interests, other misc. assets			
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
<b>Total Assets</b>	\$	\$	

