

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

*In the Conservatorship of:*

Case No.

PRIVATE PROFESSIONAL  
CONSERVATOR'S CARE AND  
MANAGEMENT PLAN

Petitioner, \_\_\_\_\_, a Private Professional Conservator, submits the following Care and Management Plan in the above referenced matter. This plan is based upon Petitioner's opinion and estimate of the services necessary to maintain and manage the person and estate of the Conservatee.

**NOTICE IS HEREBY GIVEN** to all interested persons that the Court's approval of this plan will insure that the Conservator will be entitled to receive the requested compensation at the end of the next accounting period as long as the services herein approved have been performed. Any interested person who fails to object to this petition will not be entitled to object to the services or rate of compensation, other than objections based on non-performance of the services, at the next accounting. However, at such accounting, Objections may be filed regarding any request for additional compensation not approved at this time.

CURRENT STATUS OF THE CONSERVATEE

1. Petitioner alleges as follows:

2. The Conservatee is \_\_\_\_\_ years of age.

3. The Conservatee is residing in:

- Own home / apartment
- Relative's home (relationship)\_\_\_\_\_
- Board and care
- Nursing home
- Hospital or medical facility
- Other (specify)\_\_\_\_\_
- \_\_\_\_\_

4. The Conservatee has been residing in the present residence since  
(date)\_\_\_\_\_

- There is no plan to change the Conservatee's residence.
- There are plans to change the Conservatee's residence.

If so, please describe and explain the anticipated change:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

5. (If the Conservatee is residing in his or her own home). The care providers employed to assist the Conservatee are the following:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_





11. The Conservatee's income is derived from monthly receipts from \_\_\_\_\_ sources which requires the Conservator to receive, deposit, maintain and account for same. Petitioner anticipates that \_\_\_\_\_ hours per month will be expended to properly manage these receivables. Petitioner therefore requests that the court approve compensation at the hourly rate of \$\_\_\_\_\_ per hour for a total of \$\_\_\_\_\_ per month.
  
12. The Conservatee's monthly living expenses include the handling of approximately \_\_\_\_\_ accounts payable per month. Petitioner anticipates that \_\_\_\_\_ hours per month will be expended to properly manage these payables. Petitioner therefore requests that the Court approve compensation at the hourly rate of \$\_\_\_\_\_ per hour, for a total of \$\_\_\_\_\_ per month.
  
13. It is further anticipated that the Conservator's estate will receive on the average periodic receivables and be required to pay \_\_\_\_\_ periodic payables per year. On that basis the Conservator will be required to expend approximately \_\_\_\_\_ hours per year in addition to the regular monthly expenditures described above. Petitioner therefore requests the Court to approve compensation based on the above hourly rates in the total amount of \$\_\_\_\_\_ per year.
  
14. It is anticipated that it will be necessary to expend approximately \_\_\_\_\_ hours per year maintaining and organizing the Conservator's financial records for the purpose of assisting a professional tax preparer in the preparation of the Conservatee's tax returns. Petitioner therefore requests that the Court approve an annual compensation of \$\_\_\_\_\_ for such services.



17. Petitioner requests approval of commissions earned to date for services rendered toward the establishment of the Conservatorship, marshaling the assets and other services unique to the process of establishment of this matter, including the preparation of this Petition. Petitioner attaches herewith his/her declaration in support of this request and lodges with the Court the itemized billing for the Court's review.
18. (Optional) Petitioner has incurred attorney's fees and costs in the establishment of this Conservatorship, including the preparation of this Petition, in the amount of \$\_\_\_\_\_. Petitioner attaches the Declaration of his/her attorney in support of said fees, and Petitioner's attorney lodges herewith an itemized billing for the Court's review.

**WHEREFORE**, Petitioner requests the following:

1. For approval of the above-described Management Plan.
2. For approval of periodic payments on account in the amount of \$\_\_\_\_\_ or \_\_\_\_\_% of the actual monthly compensation, whichever is less.
3. For payment for services rendered in the establishment of this Conservatorship, in the amount of \$\_\_\_\_\_.
4. For payment of attorney's fees in the amount of \$\_\_\_\_\_ and for costs in the amount of \$\_\_\_\_\_.

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Conservator