

**GUARDIANSHIP/CONSERVATORSHIP-ADULT/MINOR**

Name of Respondent: \_\_\_\_\_ Age: \_\_\_\_\_.

\_\_\_\_\_ Venue [ORS 125.020]

\_\_\_\_\_ Petition [ORS 125.055] Case Number: \_\_\_\_\_ Requesting Room and Board

\_\_\_ Respondent’s information (name, age, residence address & current location) [(2)(a)]

\_\_\_ Proposed guardian & conservator information (relationship to respondent, name, age, address) [(2)(c)]

\_\_\_ If professional, must submit disclosure statement and information under ORS 125.240

\_\_\_ If fiduciary is not the petitioner, name, age, address and interest of petitioner [(2)(b) and (c)]

\_\_\_ If fiduciary is not the petitioner, statement of fiduciary regarding willingness to serve [(2)(f)]

\_\_\_ A statement if proposed GRD or CSVR has been convicted of a crime, has filed for or received protection under the bankruptcy laws or has had a license revoked or canceled that was required by the laws of any state - if yes, explanation [(2)(d) and (e)]

\_\_\_ Name and address of any fiduciary that has been appointed by any Court, any Trustee for an established or testamentary Trust, any appointed health care representative and any person acting as attorney-in-fact under a Power of Attorney [(2)(g)]

\_\_\_ Name and address of the respondent’s treating physician and care providers [(2)(h)]

\_\_\_ Factual information that supports the request, less restrictive means that have been considered, and names/addresses of all persons with information regarding incapacity [(2)(i)]

\_\_\_ Statement of intent regarding placement [(2)(j)]

\_\_\_ Petitioner’s estimate of the estate value and statement of control over assets [ORS 125.055(2)(k), (3), and (4)]

\_\_\_ UCCJEA

Assets: \$
Income: \$

\_\_\_ Statement that indicates whether Petitioner is requesting plenary authority or specified limited authority [(2)(m)]

\_\_\_ Statement regarding fiduciary as public or private agency providing services to respondent or employee of such [(2)(L)]

\_\_\_ Bond amount: \$ \_\_\_\_\_ Restriction of assets? \_\_\_\_\_ (unrestricted assets + annual income)

\_\_\_ If funds restricted, limited judgment must state that acknowledgment of restriction to be received within 30 days. Attorney’s responsibility to see that it gets filed. [UTCR 9.050]

\_\_\_ If for purpose of lawsuit or settlement and requesting no bond, limited judgment must require court to review and approve settlement

\_\_\_ Settlement of personal injury claim must comply with UTCR 9.040

\_\_\_ OJIN/OECI background check

\_\_\_ If fiduciary is not the petitioner, acceptance by fiduciary [125.215(1)]

\_\_\_ Orders and Judgments comply with UTCR 2.010(12) and UTCR 9.030

NOTES: \_\_\_\_\_

Date of Initial Review: 0 By: BLS (Initials)