

PROBATE Q & A / CONSERVATORSHIP

<p>What is the role of the Probate Investigator?</p> <p>The Probate Investigator interviews the proposed conservatee and proposed conservator(s) as well as family members to provide the Court information in the form of a report.</p> <p>What are the qualifications of Probate Investigators?</p> <p>Qualifications to be a Probate Investigator</p> <ul style="list-style-type: none">• Graduation from an accredited 4-year university with a degree in social science, psychology, or closely related field -AND- 3 years of experience performing field investigations as a probation or parole officer, law enforcement officer, or social worker.• Some investigators hold master's degrees in a mental health area and a clinical license: LCSW and LMFT. <p>Many Probate Investigators have backgrounds with the Department of Children and Family Services (DCFS) or Adult Protective Services (APS)</p> <p>How are the Probate Investigation interviews completed?</p> <p>The Probate Investigator will contact the proposed conservatee and proposed conservator(s) to set up a meeting at the residence of the proposed conservatee. Other interviews with family members and agencies involved with the proposed conservatee will be completed by telephone.</p> <p>The Probate Investigator will meet privately with the proposed conservatee and advise the proposed conservatee that a petition has been filed and inquire</p>	<p>What is the role of the Probate Investigator?</p> <p>What are the qualifications of Probate Investigators?</p> <p>How are the Probate Investigation interviews completed?</p> <p>How long does the Probate Investigation interview at the home/facility take?</p> <p>What happens if I need to cancel the investigation appointment and am unable to reschedule it prior to the hearing date?</p> <p>Who receives a copy of the Probate Investigation report? How is confidential medical information handled?</p> <p>Does the Probate Investigator make recommendations to the Court?</p> <p>Does the Probate Investigator appear at the appointment hearing?</p> <p>Is the Probate Investigator assigned for the duration of the conservatorship?</p>
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about whether they are in support of the conservatorship and the proposed conservator. The Probate Investigator will also look into the proposed conservatee's living situation, medical and personal care, financial management and other aspects of their life, as well as their relationship with the proposed conservator.

How long does the Probate Investigation interview at the home/facility take?

The Probate Investigation interview is generally about an hour in person. Additional interviews will be held via telephone.

What happens if I need to cancel the investigation appointment and am unable to reschedule it prior to the hearing date?

The Court will need to decide whether to continue the hearing until the Probate Investigation can be completed.

Who receives a copy of the Probate Investigation report?

In addition to the Court, the proposed conservatee, proposed conservator(s), attorneys of record will receive copies of the report, as well as other persons and entities the Court determines should have copies.

How is confidential medical information handled?

A separate Confidential report is filed which includes diagnoses, medications and other medical information. The report is only provided to the proposed conservatee and their attorney of record.

Does the Probate Investigator make recommendations to the Court?

Yes. The Probate investigator makes recommendations regarding the necessity of the conservatorship and the suitability of the proposed

If I have a concern or question, who should I contact?

conservatee. The Probate Investigator may make additional recommendations related to the needs of the proposed conservatee.

Does the Probate Investigator appear at the appointment hearing?

The Probate Investigator submits a report to inform the Court on the matter, they do not appear at the hearing.

Is the Probate Investigator assigned for the duration of the conservatorship?

The Probate Investigator is only assigned for the completion of the initial investigation prior to the appointment hearing.

If I have a concern or question, who should I contact?

The Supervising Probate Investigators can respond to questions or concerns about Probate Investigations. The main telephone number is 213-830-0855. Offices are in the Stanley Mosk Courthouse, Room 208, open 8am to 4:30pm, closed from noon to 1 p.m.

What is a conservatorship review and how often is one required?

According to the California Probate Code, the Probate Investigator must meet with the conservatee and speak with the conservator(s) one year after appointment and then every one or two years thereafter, or as directed by the Court. The Probate Investigator will investigate whether the conservatorship is still necessary, whether the care and living situation of the conservatee are appropriate and inquire about the wishes of the conservatee related to the conservatorship.

What is a conservatorship review and how often is one required?

What happens during the conservatorship review appointment?

Is there a charge for the review?

What should I do if there is a change of address or death of a conservatee or conservator?

What happens during the conservatorship review appointment?

The Probate Investigator will likely contact the conservator to schedule an appointment but may appear unannounced. The Probate Investigator will meet with the conservatee privately and speak with the conservator as well. The Probate Investigator may also speak with staff at a facility or other caregivers.

The Probate Investigator will conduct the conservatorship review at the conservatee's home, or sometimes at a day program or other location.

Is there a charge for the review?

The charge for a review is \$425, unless there is a fee waiver.

What should I do if there is a change of address or death of a conservatee or conservator?

It is the responsibility of the conservator to file a Notice of Death with the Court, and to notify the Court of a change in address for the conservatee or conservator.

Is there a hearing scheduled following a conservatorship review?

In general, there are no scheduled hearings following a conservatorship review unless there is an Accounting hearing. If the Court wishes to follow up on something noted by the Probate Investigator during the conservatorship review a hearing may be ordered.

Who receives a copy of the Probate Investigations conservatorship review report?

The Court, conservatee, conservator, and attorneys of record receive copies of the conservatorship review report, as well as other persons and entities the Court determines should have copies.

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