**Superior Court of Washington, County of**

|  |  |
| --- | --- |
| In re the Guardianship/Conservatorship of:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_,  Individual | No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Petition for Washington to Accept a Guardianship and/or Conservatorship from a Transferring State**  (PT) |

**Petition for Washington to Accept a Guardianship and/or Conservatorship from a Transferring State**

I am the guardian/conservator of an Individual Subject to Guardianship/Conservatorship in another state. I am petitioning the Washington Court to enter a provisional order accepting the transfer of a guardianship or conservatorship from that other state under RCW 11.90.410.

**1. Information about the Petitioner (the guardian/conservator in another state**)

**Name:**

Relationship to Individual Subject to Guardianship/Conservatorship (Individual):

Street Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Phone Number/s: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2. Information about the Individual**

**Name:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Age: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Street Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Phone Number/s: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3. Information about the Case in the Transferring State**

1. A guardianship or conservatorship is currently in: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (*name of state*). This state is called the “transferring state.”
2. Name of the court the case is filed in: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

(*Example: Mason County District Court*.)

1. Case number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

D. The guardianship or conservatorship is a:

[ ] Full [ ] Limited Guardian and/or  
[ ] Full [ ] Limited Conservator

**4. Basis to Accept the Transfer**

I have filed a **certified copy** of the transferring state’s provisional order of transfer.

[ ] A certified copy of the *Order Appointing Guardian/Conservator*, signed by the transferring state, is:

[ ] included in or attached to the provisional order of transfer.  
 [ ] filed separately or attached to this petition.

[ ] I am eligible to be appointed as a guardian and/or conservator in Washington. I am over the age of 21, of sound mind, and I have not been convicted of a felony or misdemeanor involving dishonesty, neglect, use of physical force, or other crime relevant to my functions as guardian/conservator, and I am otherwise suitable and eligible to be appointed guardian in the State of Washington.

[ ] I do not reside in Washington State. I have appointed a resident agent and filed the *Designation of and Consent by In-State (Resident) Agent* form.

[ ] There is other information I want the court to consider:

.

**5. People Entitled to Notice**

**Name:**

Address:

Relationship to Individual:

**Name:**

Address:

Relationship to Individual:

**Name:**

Address:

Relationship to Individual:

(Attach more sheets if necessary.)

**6. Financial Information**

The approximate value and the description of the property owned by the Individual are:

A. **Assets:**

1. Real Property: $

(State/s where property is located

Stocks, Mutual Funds, & Bonds: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Mortgages and Notes: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Bank Accounts: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Other Property: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Description of other property:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**The total approximate value of assets is:** $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The Individual receives compensation, pension, insurance, and allowances as follows:

B. **Monthly Income:**

1. Social Security Benefits: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Veterans’ Benefits : $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Washington State Assistance: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. Retirement Income: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
6. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
7. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**The total approximate monthly income is:** $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**7. Lay Guardian Training**

[ ] The proposed guardian/conservator in Washington has already completed lay guardian training. Evidence of successful completion of the training is attached to the petition or filed separately.

[ ] I request an extension of up to 90 days after provisional appointment for the guardian/conservator to complete and file proof of completion of the training because:

. (If the court grants your request, evidence of successful completion of the lay guardian training will not be required until later.)

[ ] The proposed Washington guardian/conservator is not required to complete lay guardian training because he or she is:

[ ] a certified professional guardian/conservator,

[ ] a financial institution subject to the jurisdiction of the Department of Financial Institutions and authorized to exercise trust powers, **or**

[ ] a federally chartered financial institution authorized to serve as conservator.

**8. Relief Requested:**

I am asking the court to enter:

[ ] an order provisionally granting this *Petition for Washington to Accept a Guardianship or Conservatorship from a Transferring State*.

[ ] an order directing the guardian or conservator to request the transferring state to issue a final order confirming the transfer to Washington, and terminating the guardianship or conservatorship in the transferring state.

[ ] an order directing the court clerk to issue provisional Letters of Guardianship/ Conservatorship, upon filing an oath, for:

[ ] Full [ ] Limited Guardianship

[ ] Full [ ] Limited Conservatorship

which will expire 90 days after the date of the *Provisional Order Granting Transfer of Guardianship or Conservatorship to Washington*.

[ ] an order establishing the amount of the bond to be posted or requiring restricted accounts. I propose a bond of $\_\_\_\_\_\_\_\_\_\_\_.

[ ] an order directing the proposed Washington guardian/conservator to file proof of successful completion of Washington’s lay guardian training before the court enters a final order accepting guardianship in Washington.

I declare under penalty of perjury under the laws of the State of Washington that the facts I have provided on this form (including any attachments) are true. [ ] I have attached *(#):* pages.

Signed at *(city and state):* Date:

*Sign here Print name*

**Lawyer (if any) for person filing this petition fills out below:**

*Lawyer signs here Print name and WSBA No. Date*