

**Superior Court of Washington, County of \_\_\_\_\_**

In the Guardianship/Conservatorship of:

\_\_\_\_\_  
Minor

**No.**

**Order Appointing**

**Limited Conservator (ORAPLC)**

**Full Conservator (ORAPCC)**

**for a Minor**

**Clerk's Action Required, 1, 14**

**Order Appointing Full or Limited Conservator for a Minor**

**1. Summary**

Date conservator appointed:	_____
Due date for report:	_____
Date of next review:	_____
Letters expire on:	_____
Bond amount:	\$ _____
Restricted account agreements required:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Due date for inventory:	_____
Due date for conservator's plan:	_____
<input type="checkbox"/> Certified professional guardian (CPG) <input type="checkbox"/> Public professional guardian (PUG) <input type="checkbox"/> Lay (family) guardian (LGD) <input type="checkbox"/> Training completed <input type="checkbox"/> Training required	

	<u>Minor Subject to Conservatorship</u>	<u>Conservator</u>
<b>Name</b>		
<b>Address</b>		
<b>Phone</b>		
<b>Email</b>		
<b>Facsimile</b>		

	<u>Interested Party</u>	<u>Interested Party</u>
<b>Name</b>		
<b>Address</b>		

<b>Phone</b>		
<b>Email</b>		
<b>Relation to Minor</b>		

This matter came on regularly for hearing on a petition for appointment of conservator of the Minor.

The proposed conservator was present.

The following other persons were also present at the hearing: \_\_\_\_\_

\_\_\_\_\_

The court considered the written report of the Visitor (if any), the testimony of witnesses, remarks of counsel, and the documents filed herein. Based on the above, the court makes the following:

**Findings of Fact**

2. All notices required by law have been given and proof of service as required by statute is on file.

**3. Jurisdiction**

The jurisdictional facts set forth in the petition are true and correct, and the court has jurisdiction over the estate of the Minor.

**4. Minor's Attendance**

The Minor was present in court.

The Minor was not present in court.

**5. Alternative arrangements made for the Minor**

There are no alternative arrangements for assistance.

Other protective arrangements for assistance were made, but such arrangements are inadequate in the following respects: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_.

(Name) \_\_\_\_\_ has been acting in a fiduciary capacity for the Minor and should **not** continue to do so for the following reasons:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_.

**6. Basis for conservatorship**

By clear and convincing evidence:

- The appointment is in the Minor's best interest and;
  - The Minor owns funds or other property requiring management or protection that otherwise cannot be provided;
  - The Minor has or may have financial affairs that may be put at unreasonable risk or hindered because of the Minor's age; or
  - Appointment is necessary or desirable to obtain or provide funds or other property needed for the support, care, education, health, or welfare of the Minor.
- The following less restrictive protective arrangement will meet the Minor's needs:
   
\_\_\_\_\_
   
\_\_\_\_\_
   
\_\_\_\_\_
   
\_\_\_\_\_
- There is clear and convincing evidence that the Minor's needs cannot be met by limited conservatorship. The conservatorship is appropriate.
- The court has considered the Minor's parent(s)' recommendation regarding whether the conservatorship is in the best interest of the Minor.

**7. Conservator**

The proposed conservator is qualified to act as conservator for the Minor. They have filed the Disclosure of Conservator. Their address, phone numbers, and email address are as follows:

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

Phone No(s): Business \_\_\_\_\_ Personal \_\_\_\_\_

Email: \_\_\_\_\_

The relationship of the conservator to the Minor is \_\_\_\_\_

\_\_\_\_\_

- The conservator provides paid services, is a relative, or is employed by a person that provides paid services to the Minor. The court finds, by clear and convincing evidence, that the conservator is the best qualified person for the appointment and the appointment is in the best interest of the Minor.

**8. Visitor fees and costs**

- Does not apply. The court did not appoint a visitor.
- The visitor was appointed at  county expense  estate expense and shall submit a motion for payment of fees and costs pursuant to the local rules.
- The visitor has requested a fee of \$\_\_\_\_\_ for services rendered and reimbursement of \$\_\_\_\_\_ for costs incurred while acting as Visitor. Fees in the amount of \$\_\_\_\_\_ and costs in the amount of \$\_\_\_\_\_ are reasonable and should be paid as follows:
  - \$\_\_\_\_\_ by the conservator from the estate

by the County of \_\_\_\_\_  
 \$\_\_\_\_\_ by \_\_\_\_\_ for the following reason(s):

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

**9. Conservator's Bond**

The assets of the Minor:

- are unknown, and bond should be reviewed at the hearing on the Conservator's Plan.
- total less than three thousand dollars (\$3,000) and no bond is required.
- exceed three thousand dollars (\$3,000), and a bond is required.
- exceed three thousand dollars (\$3,000) and should be placed in a blocked account with an insured financial institution.
- will be held by a conservator who is a regulated financial institution qualified to do trust business in this state, and the Court waives any bond requirement.

**Conclusions of Law**

Based upon the above findings and fact, the court makes the following conclusions of law:

**10. Minor Subject to Conservatorship**

(Name) \_\_\_\_\_ is a Minor who meets the requirements to be subject to conservatorship within the meaning of Chapter 11.130 RCW, and a  full  limited conservator should be appointed.

**11. Conservator**

(Name) \_\_\_\_\_ is a fit and proper person to be appointed as a conservator.

**12. Powers and limitations of the conservator**

The powers and limitations of the conservator should be as follows:

All of the powers of a conservator, pursuant to the provisions of RCW 11.130 et. seq., that are not expressly limited.

Other: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.

**The court orders:**

**13. Appointment of conservator**

(Name) \_\_\_\_\_ is appointed as:

Full  Limited conservator of \_\_\_\_\_, and the powers and limitations of the conservator shall be as set forth in paragraph **12** of the Conclusions of Law.

**14. Letters of Conservatorship**

The clerk of the court shall issue  full  limited letters of conservatorship valid until (date) \_\_\_\_\_ to (name of conservator) \_\_\_\_\_ upon the filing of an acceptance of appointment, any bond required in paragraph 16, any verified receipt required in paragraph 16, and form *GDN ALL 008 Designation of and Consent by In-State (Resident) Agent*, if the conservator or limited conservator resides outside the state.

**15. Lay Guardian and Conservator Training**

- Does not apply. The conservator is a certified professional conservator or financial institution.
- The petitioner submitted evidence that the conservator successfully completed lay conservator training.
- The conservator must complete and file proof of completion of lay guardian training or obtain an order waiving training by (date) \_\_\_\_\_ (no more than 90 days after today's date).

**16. Conservatorship Bond and Security**

- Conservatorship bond is set in the amount of \$\_\_\_\_\_.
- Bond is waived.
- Bond shall be reviewed at the hearing on the Conservator's Plan.
- All other accounts/liquid assets in excess of the bond shall be blocked and shall not be withdrawn except by court order. The conservator shall file a receipt of funds into blocked account, form *GDN ALL 006 Receipt of Funds in Blocked Financial Account*, with the Court no later than 30 days from the date of this order.

**17. Report of substantial change in income or assets**

Within 30 days of any substantial change in the estate's income or assets, the conservator shall report to the court and schedule a hearing. The purpose of the hearing will be for the court to consider changing the bond or making other provision(s) in accordance with RCW 11.130.505.

**18. Inventory**

Within 90 days of appointment, the conservator shall file a verified inventory of the Minor's property, which has come into the conservator's possession or knowledge. The inventory shall include a statement of all encumbrances, liens, and other secured charges on any item.

**19. Disbursements**

On or before the date the inventory is due, the conservator shall also apply to the court for an order authorizing disbursements on behalf of the Minor as required by RCW 11.130.525.

**20. Conservator's Plan**

Within 90 days of appointment, the conservator shall complete and file a plan that shall comply with the requirements of 11.130.510 and set a hearing on the plan 30 days after the plan is filed.

**21. Duration of conservatorship**

This conservatorship shall continue in effect:

until it is terminated pursuant to 11.130.570;

until the Minor turns 18 years old; **or**

other: \_\_\_\_\_

**22. Discharge/retention of visitor**

Does not apply.

The visitor is discharged; **or**

The visitor shall continue performing further duties or obligations as follows:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.

**23. Persons with a right to receive notice and pleadings**

The following persons listed below are entitled to certain statutory notices, as described in RCW 11.130.420.

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

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

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

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

*(Add more names or extra sheets if necessary)*

**24. Conservator fees**

The conservator shall petition the court for approval of fees. The conservator may advance themselves \$\_\_\_\_\_ per month, subject to court review and approval.

**25. Court Visitor fee**

Does not apply.

Fees and costs are approved as reasonable; **or**

The visitor fees and costs are approved as reasonable in the total amount of \$\_\_\_\_\_. They shall be paid from  the estate assets,  the county,  other source as follows: \_\_\_\_\_

**26. Legal Fees**

The legal fees and costs of \_\_\_\_\_ are approved as reasonable in the amount of \$\_\_\_\_\_, and shall be paid from the:

- Conservatorship estate assets
- Other source(s) as follows: \_\_\_\_\_

**27. Conservator’s report and accounting**

The conservator’s report shall cover the:

**12 month**  **24 month**  **36 month** period following the appointment. The conservator must file their report and accounting by \_\_\_\_\_ (date, which is within 90 days of the end of the reporting period) and shall comply with the requirements of RCW 11.130.505.

The court must review the report within 120 days of the end of the reporting period.

- A review hearing is set for the date listed in 1.
- The conservator must set a review hearing within 120 days of the end of the reporting period.

Other reporting requirements: \_\_\_\_\_

**28. Other**

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

Dated \_\_\_\_\_

\_\_\_\_\_  
 Judge/Court Commissioner

Presented by:

\_\_\_\_\_  
 Signature of Petitioner/Lawyer

\_\_\_\_\_  
 Printed Name                      WSBA or CPG No.

Copy received and approved by:

\_\_\_\_\_  
 Signature of Conservator

\_\_\_\_\_  
 Printed Name                      WSBA or CPG No.

\_\_\_\_\_  
 Signature of Party/Lawyer

\_\_\_\_\_  
 Printed Name                      WSBA or CPG No.

**To the Minor:**

Attached is a copy of the *Order Appointing a Conservator*. Please review it carefully so you know what rights have been given to the Conservator and what rights you retain. You have the right to ask the court to end or change the conservatorship.