

SUPERIOR COURT OF CALIFORNIA COUNTY OF SANTA CLARA	
IN THE MATTER OF THE <input type="checkbox"/> Guardianship <input type="checkbox"/> Limited Conservatorship <input type="checkbox"/> Conservatorship <input type="checkbox"/> Trust OF:	
CONFIDENTIAL DOCUMENT COVER SHEET (Guardianship – Conservatorship – Trust)	CASE NUMBER

RE: GUARDIANSHIPS:

The following documents are confidential and shall be made available only to persons who have been served in the proceedings and/or their attorneys.

- Probate Code § 1513:** Court Investigator/Family Court Services/Social Services Agency report for appointment of Guardian.
- Probate Code § 1513.2:** Confidential Guardianship Status report.
- Cal. Rules of Court, Rule 7.1001:** Confidential Guardianship Screening Form.
- Review of Existing Guardianship Reports**
- Other:**



RE: CONSERVATORSHIPS:

The following documents shall be made available only to parties, persons given notice of the petition who have requested the document or who have appeared in the proceedings, their attorneys, and the court. The court shall have discretion at any other time to release the document, if it would serve the interests of the conservatee.

- Probate Code § 1821:** Supplemental Information form.
- Probate Code § 1826:** Court Investigator's appointment report.
- Probate Code § 1851:** Court Investigator's review report.
- Probate Code § 1827.5:** Ltd. Conservatorship: Regional Center assessment.
- Cal. Rules of Court, Rule 7.1050:** Confidential Conservator Screening Form.
- Other:**



RE: ESTATE PLANNING DOCUMENTS:

The following estate planning documents shall be made available only to persons who have applied to the court and have been granted permission to review the documents.

- Estate Planning Documents:**

MUST BE FILED IN DUPLICATE