

DECLARANT (Name): _____ TITLE: _____ INSTITUTION (Name): _____ ADDRESS: _____ TELEPHONE: _____ FAX (Optional): _____	FOR COURT USE ONLY
SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: _____ MAILING ADDRESS: _____ CITY AND ZIP CODE: _____ BRANCH NAME: _____	NO FILING FEE
<input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP OF (Name): _____ <div style="text-align: right;"><input type="checkbox"/> MINOR <input type="checkbox"/> CONSERVATEE</div>	
NOTICE OF OPENING OR CHANGING A GUARDIANSHIP OR CONSERVATORSHIP ACCOUNT OR SAFE-DEPOSIT BOX	CASE NUMBER: _____
NOTE TO FINANCIAL INSTITUTION: When a guardian or conservator of the estate of a person opens or changes the name on an account or a safe-deposit box in a "financial institution" (a bank, a trust, a savings and loan association, a savings bank, an industrial bank, or a credit union), the institution must file a statement with the court having jurisdiction over the proceeding and identified in the <i>Letters of Guardianship</i> or <i>Letters of Conservatorship</i> . The statement must contain the information specified below concerning each new or existing account or safe-deposit box in the institution. The statement must be signed by an authorized officer of the institution.	

1. I am an officer of the financial institution identified in this statement, and I am authorized to sign this statement on its behalf.
2. The guardian or conservator presented *Letters of Guardianship* or *Letters of Conservatorship* identifying the guardian or conservator of the estate of the ward or conservatee named above.
3.
 - a. Financial institution (name): _____
 - b. Branch (name): _____
 (street address): _____
 (city and zip code): _____ (telephone): _____
4. ☐ Account status (check one; identify additional new or existing accounts on Attachment 4):
 - a. ☐ (1) New account opened on (date): _____ reflecting the guardianship or conservatorship.
 (2) Account number: _____
 - b. ☐ (1) Existing account changed on (date): _____ to reflect the guardianship or conservatorship.
 (2) Account number: Before change: _____ After change: _____
 (3) Name on account before change (state each name): _____
 - c. Opening balance of new account or balance of existing account immediately after change: \$
5. ☐ Safe-deposit box status (check one. Identify additional safe-deposit boxes on Attachment 5):
 - a. ☐ New box rented on (date): _____ reflecting the guardianship or conservatorship.
 - b. ☐ Existing box rental changed to reflect the guardianship or conservatorship on (date): _____
 - c. New safe-deposit box number or current number after change: _____
 - d. This institution ☐ has ☐ has not been given access to the safe-deposit box identified above.
 (If you checked "has," complete item 5e.)
 - e. ☐ The contents of the safe-deposit box identified above are as follows (list the contents in general terms, such as "currency, coins, jewelry, tableware, insurance policies or certificates, stock certificates, bonds, deeds, and wills"):
6. Name of each person who opened or whose name was added to above-identified account or safe-deposit box (state each name):

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: _____

(TYPE OR PRINT NAME OF AUTHORIZED OFFICER)

▶

(SIGNATURE OF AUTHORIZED OFFICER)