

Adult Guardianship

CLIENT INTAKE & MEETING PREPARATION

01 People and location

Complete after our office requests intake and confirms the conflict-screening step. Unknown / N/A is OK.
Do not enter full SSNs, account numbers, passwords or payment-card details. Keep completed copies private.
Download and save locally before typing. No information is sent to our office by filling in this PDF.

Person who may need assistance: full legal name; age; residence/county/state

Your name, relationship, address and safe phone/email

Person completing the form; any authority already held; co-guardian proposed, if any

Spouse/partner, close relatives and people involved: names, relationships and contact details

Any disagreement about assistance or a proposed guardian

Urgent safety issue, hearing, discharge or other time-sensitive event; exact dates

Ask our office for a verified secure return method, or bring a printed copy to your meeting.
Do not return sensitive completed forms through the website contact form or ordinary email.
Not a court/agency application or legal advice. Completing this form does not establish representation.

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02 Care, function and alternatives

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Current living arrangement; assistance provided, by whom and how often

Medical/developmental conditions affecting decisions; treating providers; evaluations available

Daily tasks: bathing, dressing, meals, toileting, medication; what help is needed?

Decisions and safety: money, bills, communication, travel, judgment; give factual examples

Existing power of attorney, health directive, representative payee, trust or other support

What decisions cannot presently be handled; alternatives tried and results

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03 Finances, proceedings and documents

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Assets, income, benefits, debts and insurance: approximate amounts, ownership and who manages them

Prior/pending guardianship or other court matters: county/state, dates, orders and lawyer(s)

Proposed guardian: relationship and practical ability to assist; concerns for private attorney review

Available documents: directives, court orders, evaluations, benefits letters, medication list

Additional facts and questions; ask our office before arranging filing-specific examinations

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