

DECLARANT (Name): _____ TITLE: _____ INSTITUTION (Name): _____ ADDRESS: _____  TELEPHONE: _____ FAX (Optional): _____	<b>FOR COURT USE ONLY</b>
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF</b> STREET ADDRESS: _____ MAILING ADDRESS: _____ CITY AND ZIP CODE: _____ BRANCH NAME: _____	
<input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP    OF (Name): _____  <div style="text-align: right;"> <input type="checkbox"/> MINOR    <input type="checkbox"/> CONSERVATEE         </div>	<b>NO FILING FEE</b>
<b>NOTICE OF OPENING OR CHANGING A GUARDIANSHIP OR          CONSERVATORSHIP ACCOUNT OR SAFE-DEPOSIT BOX</b>	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 *Letters of Guardianship* or *Letters of Conservatorship*. 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)
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