

Comments may be directed in writing to:
San Luis Obispo Superior Court/Administration
1035 Palm Street, Room 385
San Luis Obispo, CA 93408

Comment Period Deadline: May 9, 2016

PROPOSED CHANGES TO LOCAL RULES EFF JULY 1, 2016

RULE 31.05

LIMITATIONS ON FILINGS

Notwithstanding any other provision of law or this rule, no will, codicil, testamentary trust, bond, undertaking, subpoenaed documents, or financial documents submitted by private professional conservators or guardians or California state vital records forms shall be electronically filed.

Any exhibits that cannot be accurately transmitted via electronic filing due to size or type, subpoenaed documents or documents lodged with the court provisionally under seal may not be electronically filed. (Amended 1/1/16/7/1/16)

RULE 11.1815

**REQUIRED SUPPORTING DOCUMENTS AT TIME CONSERVATORSHIP/
GUARDIANSHIP PETITION FILED**

In an effort to provide investigations by the appropriate entity in a timely manner for hearings, with every initial Petition for Probate Conservatorship of the person and/or estate or Petition for Guardianship of the person and/or estate, the Petitioner must concurrently file the following documents listed below under subsections (a) or (b), as appropriate. Initial Petitions submitted without the supporting documents listed below shall be rejected by the Civil Clerk's office until all of the necessary supporting documents, as indicated, are provided. An "Initial Petition" is defined as the first Petition for Conservatorship of the person and/or estate or first Guardianship of the person and/or estate, filed by a Petitioner, regardless of whether the filing is a temporary petition or general petition. Competing or subsequent Petitions for Conservatorship of the person and/or estate or Guardianship of the person and/or estate, filed by another Petitioner or nominating a different proposed guardian/ conservator, must also provide the supporting documents listed below before the filing will be accepted by the Civil Clerk for filing. Other documents may be necessary to proceed at the time of hearing, but only the documents listed below are required for the Civil Clerk's Office to file the Petition.

(a) Petitions for Conservatorships of the Person and/or Estate supporting documents:

(1) Confidential Conservator Screening Form (Judicial Council Form GC-314)

(2) Order Appointing Court Investigator (Judicial Council Form GC-330)

(b) Petitions for Guardianships of the Person and/or Estate supporting documents:

(1) Confidential Guardian Screening Form (Judicial Council Form GC-212).

(Adopted 7/1/16)