

## REQUEST FOR ANCILLARY SERVICES

Requests by retained attorneys for ancillary services at public expense, including appointment of investigators, experts, or others shall be presented for consideration and order by the Assistant Presiding Judge. Requests for ancillary services shall include the following:

- Attorney's declaration (original and two copies) in support of the request that contains:
  - Summary of the charges and overview of the case
  - If applicable, disclosure of attorney's representation of defendant in any other legal action
  - Justification for appointment of investigator, expert, or service to be performed
  - Requests for appointment of investigator must include an investigation plan containing outline of duties to be performed and relevance of duties to the case
  - Attorney's estimate of the number of hours necessary to complete investigation
- A copy of the attorney/client retainer agreement
- A copy of the complaint, information, or indictment
- A completed financial statement of defendant
- If the defendant did not fund the retainer, a completed financial statement of any party (or parties) who funded the retainer
- For appointment of expert witness, the *curriculum vitae* of the expert
- Order for Appointment (original and two copies)
  - Order for appointment of investigator or order for appointment of experts must:
    - Be directed to: San Luis Obispo Court Fiscal Services
    - Contain full name, professional designation or professional license number of expert
    - Contain court approved hourly and mileage (if applicable) rates, along with a cap amount

<p align="center"><b>Superior Court of California, County of San Luis Obispo</b></p> <p><input type="checkbox"/> <b>San Luis Obispo Branch</b>, County Government Center, 1050 Monterey Street, Room 220, San Luis Obispo, CA 93408</p> <p><input type="checkbox"/> <b>Grover Beach Branch</b>, 214 South 16th Street, Grover Beach, CA 93433</p> <p><input type="checkbox"/> <b>Paso Robles Branch</b>, 901 Park Street, Paso Robles, CA 93446</p>	FOR COURT USE ONLY
<p align="center"><b>THE PEOPLE OF THE STATE OF CALIFORNIA</b></p> <p align="center">vs.</p> <p align="right">Plaintiff,</p> <p align="right">Defendant,</p>	
<b>FINANCIAL STATEMENT</b>	Case Number

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_ City/Zip Code: \_\_\_\_\_

Telephone # (Home): \_\_\_\_\_ Telephone # (Work): \_\_\_\_\_

Social Security #: \_\_\_\_\_ Driver's License #: \_\_\_\_\_

Defendant's Occupation: \_\_\_\_\_

Employer's Name: \_\_\_\_\_ Address: \_\_\_\_\_

If Defendant is not currently working:

Name of Last Employer: \_\_\_\_\_ Last Employment Date: \_\_\_\_\_

Address of Employer: \_\_\_\_\_

Marital Status: \_\_\_\_\_ Single \_\_\_\_\_ Married \_\_\_\_\_ Divorced \_\_\_\_\_ Separated

Spouse's Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Spouse's Employer/Address: \_\_\_\_\_

Spouse's Social Security #: \_\_\_\_\_ Driver's License #: \_\_\_\_\_

Dependants:

Name	Address	Relationship	Age

## Monthly Financial Statement

Monthly Income:		Assets:	
Gross Salary (wages)	\$	Cash (Checking, Savings, Money Market Accts:	\$
Spouse's Gross Salary (wage)		Real Estate – Market Value	
Unemployment/Disability		Furniture and Fixtures	
Veterans Benefits		Car(s) – Resale Value	
Other Income (Itemize):		Personal Property (Boats, Cameras, etc.)	
		IRA's	
		Stocks, Bonds, etc. – Market Value	
TOTAL MONTHLY INCOME:	\$	Other Assets (Itemize):	
Monthly Expenses: (include spouse)			
Mandatory Payroll Deductions:	\$		
Voluntary Payroll Deductions:			
Rent or Mortgage Payment:			
Taxes and Assessments:		TOTAL ASSETS:	\$
Food:			
Clothing:		Liabilities:	
Utilities (Gas, Electric, Water, Phone)		Balance Due on Real Estate:	\$
Car Payment(s):		Balance Due on Personal Property:	
Gasoline (Transportation Expense)		Attorney Fees Due:	
Insurance Premiums:		Other Creditors (itemize):	
Child Support or Alimony:			
Contributions:			
Other expenses (itemize):			
TOTAL MONTHLY EXPENSES	\$	TOTAL LIABILITIES:	\$

### DECLARATION OF DEFENDANT

I declare under penalty of perjury that the above is a true and correct statement of my financial status. This declaration is executed on \_\_\_\_\_, 20\_\_ (date) at \_\_\_\_\_ (city), California, County of \_\_\_\_\_.

\_\_\_\_\_  
Signature of Defendant