State	of Minnesota	District Court
County	y of:	Court File Number:
Judicia	al District:	Case Type: Guardianship/Conservatorship
In Re:	Conservatorship of:	
	Petition for Appoint	ment of Conservator (GAC507)
Note:	·	o appoint a Conservator for the Respondent. It is which states what must be included in a petition.
	<ul> <li>If you want to ask for a Gua GAC503 instead.</li> </ul>	ordian <i>and</i> a Conservator, do not use this form. Use
	• If you want to ask only for a	Guardian, do not use this form. Use GAC505 instead.
correc	t.	erything I have stated in this document is true and
interp	reter Information	
•	When requested, the Court may pr	rovide an interpreter at a Conservatorship hearing.
Do you		it need an interpreter at a hearing in this case?
	□ No. □ Yes.	
		each person needing an interpreter:
	Name	What language?
Inform	nation about Petitioner	
1. Pe	titioner's Name and Contact Informa	ation
	st Name:	

	Middle Name:	
	Last Name:	
	Address:City, State, Zip:	
	Telephone number:	
	Email address: or □	
	or =	None
2.	Why did you take on the responsibility to file this <i>Petition</i> ?	
3.	What is your relationship to the Respondent?	
	☐ Family – describe:	
	☐ Friend – describe:	
	☐ Other – describe:	
Inf	formation about Respondent	
4.	Respondent's Full Name, Date of Birth, and Primary Language	
	a. Respondent's Full Name.	
	First Name:	
	Middle Name:	
	Last Name:	
	b. What name does Respondent usually go by?	
	c. Respondent's Date of Birth:	
	d. Respondent's Primary Language: ☐ English <b>or</b> ☐ Other:	
5.	Respondent's Address and Contact Information	
	a. Respondent's Telephone Number:	
	b. Respondent's Home Address:	

C.	What type of residence is this? Check all that apply:		
	☐ Private home (for example, a house or apartment).		
	☐ Group home:  What is the name of agency or company operating the group home?		
	What is the name of the administrator of the group home?		
	☐ Assisted living facility:  What is the name of agency or company operating the assisted living facility?		
	What is the name of the administrator of the assisted living facility?		
	☐ Nursing home: What is the name of agency or company operating the nursing home?		
	What is the name of the administrator of the nursing home?		
	☐ Other:		
	<b>NOTE:</b> The Respondent's "home address" is their principal address (where they usually live). Answer the questions below to let the Court know if the Respondent is currently in a different, temporary, location (such as a hospital, nursing home, acute care center, etc.).		
d.	Is Respondent currently staying at their home address listed above? $\Box$ Yes. $\Box$ No.		
	• If no, list the address where Respondent is temporarily staying:		
	Name of Facility:		
	Administrator's Name:		
	Address:		
	City, State, Zip:		
	Type of Facility or Residence:		

Inf	formation about People Interested in Respondent
	<ul> <li>Minnesota Statutes § 524.5-403(b) says the <i>Petition</i> must contain the names and addresses of several individuals who may be related to or interested in the Respondent's well-being.</li> </ul>
6.	Is the Respondent married?
	$\square$ <b>No</b> , the Respondent is not married.
	Has Respondent lived with an adult for more than 6 months before the filing of this <i>Petition</i> ?
	<ul> <li>No (Respondent has not lived with another adult for more than 6 months before the filing of this <i>Petition</i>).</li> </ul>
	$\square$ Yes. Respondent lived with the following adult:
	Name:
	Address:City/State/Zip:
	Or
	☐ <b>Yes</b> , the Respondent is married.
	Name of Respondent's Spouse:
	Street Address:
	City/State/Zip:
7.	Respondent's Relatives.
	Use more paper if you need more space.
	<ul> <li>a. Does Respondent have any adult children or stepchildren?</li> <li>\( \subseteq \text{No.} \)</li> <li>\( \subseteq \text{Yes.} \)</li> </ul>
	<ul> <li>If yes, list the names and addresses of the Respondent's adult children and stepchildren:</li> </ul>
	Name:

Address:

Relationship:  $\square$  Adult child  $\square$  Adult stepchild

City/State/Zip: \_\_\_\_\_

Name:
Address:
City/State/Zip:
Relationship:   Adult child   Adult stepchild
Name:
Address:
City/State/Zip:
Relationship: □Adult child □Adult stepchild
→ If you answered "YES" to #7(a), you do not have to answer (b) and (c). Skip to #8.
b. There are two main questions in #7(b) – and each asks for follow-up information.
Question: Does Respondent have a parent who is still living? ☐ No ☐ Yes
• If yes, list the names and addresses of the Respondent's living parents:
Parent:
Address:
City/State/Zip:
Parent:
Address:
City/State/Zip:
Question: Does Respondent have any adult siblings? ☐ No ☐ Yes
• If yes, list the names and addresses of the Respondent's adult siblings:
Name of adult sibling:
Address:
City/State/Zip:
Name of adult sibling:
Address:
City/State/Zip:
Name of adult sibling:

	Address:
	City/State/Zip:
	→ If you answered "YES" to #7(b), you do not have to answer (c). Skip to #8.
c.	List the name and address of the Respondent's closest relative who can be found.
	Name:
	Address:
	City/State/Zip:
	Relationship:
Re	spondent's <b>Current Legal Representatives</b> (if any).
•	If the answer to any of the following is "yes," give the name and address of the legal representative.
a.	Does Respondent have a court-appointed guardian?
	☐ Unknown.
	$\square$ No.
	☐ Yes:
	Name of Respondent's court-appointed guardian:
	Court-appointed guardian's address:City/State/Zip:
	Court File Number:
	<ul> <li>If the court order is from someplace other than Minnesota, include a copy of the order with this <i>Petition</i>.</li> </ul>
b.	Does Respondent have a court-appointed conservator?
	☐ Unknown.
	$\square$ No.
	☐ Yes:
	Name of Respondent's court-appointed conservator:
	Court-appointed conservator's address:City/State/Zip:
	Court File Number:
	Re •

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of the order with this Petition. c. Does Respondent have a representative payee (sometimes called a "rep payee")? ☐ Unknown. ☐ No. ☐ Yes: Name of rep payee: \_\_\_\_\_ Rep payee's address: City/State/Zip: d. Does Respondent have a trustee or a custodian of a trust or custodianship? ☐ Unknown. ☐ No. ☐ Yes: Name of trustee or custodian: Trustee or custodian's address: City/State/Zip: \_\_\_\_\_ e. Does the Respondent have an attorney-in-fact appointed through a "Power of Attorney"? ☐ Unknown. ☐ No. ☐ Yes: Name of attorney-in-fact: Attorney-in-fact's address: City/State/Zip: \_\_\_\_\_ f. Does the Respondent have any **other legal representative**? ☐ Unknown. ☐ No. ☐ Yes: Name of Respondent's legal representative: Legal representative's address: City/State/Zip:

• If the court order is from someplace other than Minnesota, include a copy

How is	this person a legal representative for Respondent?
Less Restrictive M	eans
UNLESS the this <i>Petitio</i> have been sufficient to	law says that a judicial officer cannot appoint a guardian or conservator e Respondent's identified needs cannot be met by less restrictive means. In <i>n</i> , you must tell which less restrictive means have been considered, which attempted (and for how long), and how these less restrictive means were no o meet the Respondent's identified needs.
9. Less Restrictive	iate technological assistance:
Describe	:
	use of technological assistance attempted?  Yes:  How long was technological assistance attempted?
	Why wasn't the use of technological assistance sufficient to meet the Respondent's needs?
OI	r
	<b>No</b> . The use of technological assistance was not attempted because:
b. <b>Support</b> e	ed decision making:
	_
Describe	:

□ <b>Y</b>	
	How long was supported decision making attempted?
	Why wasn't the use of supported decision making sufficient to meet the Respondent's needs?
or	
_	No. The use of supported decision making was not attempted because:
Representati	ve payee (also called "rep payee"):
-	ve payee (also called "rep payee"):
-	
Describe:	se of a representative payee attempted?
Describe: _	se of a representative payee attempted? Yes:
Describe:	se of a representative payee attempted?
Describe:	se of a representative payee attempted? Yes:
Describe:	se of a representative payee attempted? Yes:
Describe:	se of a representative payee attempted?  Yes:  How long was the use of a representative payee attempted?  Why wasn't the use of a representative payee sufficient to meet the
Describe:	se of a representative payee attempted?  Yes:  How long was the use of a representative payee attempted?  Why wasn't the use of a representative payee sufficient to meet the
Describe:	se of a representative payee attempted?  Yes:  How long was the use of a representative payee attempted?  Why wasn't the use of a representative payee sufficient to meet the
Describe: Was the usY	se of a representative payee attempted?  Yes:  How long was the use of a representative payee attempted?  Why wasn't the use of a representative payee sufficient to meet the
Describe: Was the usY	The of a representative payee attempted?  Yes:  How long was the use of a representative payee attempted?  Why wasn't the use of a representative payee sufficient to meet the Respondent's needs?

	ribe:
Was	the use of trusts assistance attempted?
	☐ Yes:
	How long was the use of trusts attempted?
	Why wasn't the use of trusts sufficient to meet the Respondent's need
	or
	$\square$ <b>No</b> . The use of trusts was not attempted because:
	-
Bankin	g or bill-paying assistance:
	g or bill-paying assistance:
Desc	ribe:
Desc	the use of banking or bill-paying assistance attempted?
Desc	the use of banking or bill-paying assistance attempted?
Desc	the use of banking or bill-paying assistance attempted?
Desc	the use of banking or bill-paying assistance attempted?
Desc	the use of banking or bill-paying assistance attempted?
Desc	the use of banking or bill-paying assistance attempted?
Desc	the use of banking or bill-paying assistance attempted?  Yes:  How long was the use of banking or bill-paying assistance attempted?  Why wasn't the use of banking or bill-paying assistance sufficient to m
Desc	the use of banking or bill-paying assistance attempted?  Yes:  How long was the use of banking or bill-paying assistance attempted?  Why wasn't the use of banking or bill-paying assistance sufficient to m
Desc	the use of banking or bill-paying assistance attempted?  Yes:  How long was the use of banking or bill-paying assistance attempted?  Why wasn't the use of banking or bill-paying assistance sufficient to m

Des	cribe:
Wa	s the use of an appointed attorney-in-fact attempted?
	How long was the use of an appointed attorney-in-fact attempted?
	Why wasn't the use of an appointed attorney-in-fact sufficient to meet the Respondent's needs?
	or
	$\square$ <b>No</b> . The use of an appointed attorney-in-fact was not attempted because:
g. Prote	ctive arrangement under Minn. Stat. § 524.5-412:
	ctive arrangement under Minn. Stat. § 524.5-412: cribe:
Des	s the use of a protective arrangement attempted?
Des	s the use of a protective arrangement attempted?  □ Yes:
Des	s the use of a protective arrangement attempted?
Des	s the use of a protective arrangement attempted?  □ Yes:
Des	s the use of a protective arrangement attempted?  Yes:  How long was the use of a protective arrangement attempted?  Why wasn't the use of a protective arrangement sufficient to meet the
Des	s the use of a protective arrangement attempted?  Solven:  Solven:

□ No. The use of a protective arrangement was not attempted because:
h. Other less restrictive means considered or attempted:
Type of Less Restrictive Means Considered or Attempted:
Why wasn't this sufficient to meet the Respondent's needs?
Type of Less Restrictive Means Considered or Attempted:
Why wasn't this sufficient to meet the Respondent's needs?
Type of Less Restrictive Means Considered or Attempted:
Why wasn't this sufficient to meet the Respondent's needs?
Nominations
.0. <b>Respondent's nominations.</b> Has the Respondent nominated or named anyone to be their conservator?   \[ \sumsymbol{\sum} \text{Yes}  \sumsymbol{\sum} \text{No} \]
• If Yes, list the name, address, and phone number of each person nominated (named) by Respondent to be their conservator:
Name of Respondent's Nominee:
Street Address:City/State/Zip:
Telephone Number:Email:

	Name of Respondent's Nominee:
	Street Address:
	City/State/Zip:
	Telephone Number:
	Email:
	Name of Respondent's Nominee:
	Street Address:
	City/State/Zip:
	Telephone Number:
	Email:
11. Is	the Respondent a person with developmental disabilities or dependent and neglected
W	rard of the Commissioner of Human Services? $\square$ Yes $\square$ No
12. Is	the Respondent under the temporary custody of the Commissioner of Human Services?
	☐ Yes ☐ No
	ondent's Income and Assets

- "Respondent's property with an estimate of its value, including any insurance or pension, and the source and amount of any other anticipated income or receipts."
- Give details about Respondent's assets and income (write "none" if Respondent does not own a particular asset or have that type of income):

Asset or Income	Value or Amount	Details
Homestead		
Other real estate		
Money (cash on hand or in accounts)		
Investments		
Personal property		

	Asset or Income	Value or Amount	Details		
	Insurance				
	Pension or				
	retirement				
	Income				
	Other				
Informa	ation about the Prop	osed CONSERVATOR			
14 Pro	nosed <b>Conservator</b> 's	Name and Contact Ir	formation		
ls t	he proposed Conser	vator also the Petition	ner (listed in #1)?   Yes   No		
•	If No, give the follo	owing information abo	out the proposed Conservator:		
	Name:				
	City/State/Zip:				
			or $\square$ None		
	LIIIaii		or 🗆 None		
15 Who	naminated this pro-	accod Consomistania (	Charle all that apply)		
15. WIIO	☐ Respondent	posed <b>Conservator</b> ? (	спеск ан that арргу)		
	☐ Respondent's	narent			
	☐ Respondent's	•			
	•	servator (self-nomina	ted)		
	<u> </u>	•			
16. Was	s the proposed <b>Cons</b>	<b>ervator</b> previously ap	pointed as Conservator of the Respondent by a		
	rt order?		,		
	$\square$ Yes (list the C	ourt File Number:	)		
	□ No				
17. Wh	y is the proposed <b>Co</b>	<b>nservator</b> the most su	uitable and best qualified among those available		
and	willing to serve as co	onservator?			

## Powers of the Conservator - Minn. Stat. § 524.5-417

Respondent's demonstrated needs. 22. What powers are needed for a Conservator to protect and supervise the Respondent's estate? a.  $\square$  Limited Powers to Conservator. The Court should grant to the Conservator the power and duty to exercise the following rights and powers under Minn. Stat. § 524.5-417(c) and Minn. Stat. § 524.5-418 subject to the procedures and Court approval set forth in statute. Check the boxes to tell the Court which powers and duties Petitioner is asking the Court to grant to the Conservator:  $\square$  (a) Pay reasonable charges for the support, maintenance, and education of the person subject to conservatorship in a manner suitable to their station in life and the value of their estate, pursuant to Minn. Stat. § 524.5-417(c)(1).  $\Box$  (b) Pay out of the estate of the person subject to conservatorship all lawful debts of the person subject to conservatorship, and the reasonable charges incurred for the support, maintenance, and education of the spouse and dependent children (if any) of the person subject to conservatorship, pursuant to Minn. Stat. § 524.5-417(c)(2).  $\square$  (c) Possess and manage the estate of the person subject to conservatorship, collect all debts and claims in favor of the person subject to conservatorship, or with the approval of the court compromise them, institute suit on behalf of and represent the person subject to conservatorship in all civil court proceedings; and invest all funds not currently needed for debts, charges, and management of the estate in accordance with the provisions of Minn. Stat. §§ 48A.07, subd. 6, 501C.0901, and 524.5-423, or as otherwise ordered by the court, pursuant to Minn. Stat. § 524.5-417(c)(3).  $\square$  (d) Exchange or sell an undivided interest in real estate that the Respondent inherited, or purchase, on behalf of the person subject to conservatorship, interest other heirs may have in the real estate, pursuant to Minn. Stat. § 524.5-417(c)(4) subject to the procedures and Court approval set forth in Minn. Stat. § 524.5-418.  $\square$  (e) Sell, mortgage, or lease real estate subject to the procedures and Court approval set forth in Minn. Stat. § 524.5-418.

The Court will grant to a conservator only those powers necessary to meet the

Stat. § 524.5-417(c)(5).

(f) Approve or withhold approval of any contract, except for necessities, which the person subject to conservatorship may make or wish to make, pursuant to Minn.

	☐ (g) Apply on behalf of the person subject to conservatorship for any assistance, services, or benefits available to the person subject to conservatorship through any unit of government, pursuant to Minn. Stat. § 524.5-417(c)(6).
	☐ (h) Establish and exercise all powers over an ABLE (Achieving a Better Life Experience) account for the benefit of the person subject to conservatorship, pursuant to Minn. Stat. § 524.5-417(c)(7).
	☐ (i) Other:
Or	
b.	☐ <b>All Powers to Conservator</b> . The Court should grant to the Conservator the power and duty to exercise all rights and powers on behalf of the Respondent under Minn. Stat. § 524.5-417(c) and Minn. Stat. § 524.5-418 subject to the procedures and Court approval set forth in that statute. <b>Explain why the Court should not limit the Conservator's powers:</b>
Additi	onal Information about the Proposed Conservator
Ţ.	
	Important!
•	According to Minn. Stat. § 524.5-403(d), the <i>Petition</i> must include the information in this section about the following individuals:  o the Proposed Conservator; o all Co-Conservators; <i>and</i>
	<ul> <li>any employee of the Conservator who will be responsible for exercising powers and duties under the conservatorship.</li> </ul>
•	<b>NOTE:</b> You will need to fill out the <i>Co-Conservator Attachment to Petition</i> (GAC502-Co-C) to answer these questions about co-conservators.
	s the proposed <b>Conservator</b> ever been removed for cause from serving as a guardian or nservator?
	No.
Or	

					s been removed for
caus	se from serving	g as a guardian or o	conservator. These	are the details	s of the case:
	Location: _				
	Court File I	Number:			
	uch does the p rator services?		tor anticipate charg	ging for the pe	formance of their
			(na	me) anticipate	s charging:
\$					
·	☐ hourly				
	☐ monthly				
	☐ flat rate				
	$\square$ other:				
If Year	Professiona □ Professiona □ Professiona Give a summa	al guardian al conservator ry of this person's	nal conservator?	(name) is a: (C ound, relevant	theck all that apply) work experience,
26. Has the	proposed <b>Cor</b>	nservator applied f	t customary rate poor or or held any professes applied for or h	essional license	es? 🗆 No 🗀 Yes
	Name of Person	Type of License	Agency	License Number	Status (for example: active, expired, suspended, etc.)

Name of Person	Type of License	Agency	License Number	Status (for example: active, expired, suspended, etc.)

		led, explain why:
27.	-	oposed <b>Conservator</b> been found civilly liable in an action involving fraud, entation, material omission, misappropriation, theft, or conversion?
	$\square$ No	
	Or	
	□ Yes,	(name) has been found civill
		n an action involving fraud, misrepresentation, material omission, propriation, theft, or conversion.) These are the details of the case:
		Court location:
		Court File Number:
	Has the p last 5 yea □ No	oposed <b>Conservator</b> filed or received protection under the bankruptcy laws in the s?
	Or	
		(name) has filed or has ed protection under the bankruptcy laws in the last 5 years. These are the details case:
		Court location:
		Court File Number:
29.	Does the them?	proposed <b>Conservator</b> have any outstanding civil monetary judgments against
	Or	

☐ Yes, _	(name) has outstanding civil
mone	tary judgments against them. These are the details of the case:
	Court location:
	Court File Number:
	er for Protection (OFP) or Harassment Restraining Order (HRO) in effect (or has one fect) against the proposed <b>Conservator</b> ?
Or	
	(name), currently has, or has n order for protection or harassment restraining order issued against them.
	Court location:
	Court File Number:
31. Has the p	roposed <b>Conservator</b> been convicted of a gross misdemeanor or felony crime?
□ Yes.	(name) has been convicted of
	s misdemeanor or felony crime. These are the details of the case:
	Name of Crime or Offense:
	Court location:
	Court File Number:
• NOTI	Do not include petty misdemeanors or traffic offenses.
	REQUESTS
Petitioner as order:	ss the Court to schedule hearing on this petition and, after the hearing, issue an
	nting Conservator of Respondent
W	th the powers and duties described in statements at #22 above.

☐ Appointing	as Co-Conservator of	
Respondent with the	e powers and duties described in the statements contained in the	
Co-Conservator Atta	chment to Petition (GAC502-Co-C).	
I declare under penalty of perju Minn. Stat. § 358.116	ry that everything I have stated in this document is true and correct.	
Date:	Signature:	
	Printed Name:	
	Address:	
County and state where signed	City/State/Zip:	
	Phone:	
	Email:	