

Conservatorship Investigation



Probate Investigations

Stanley Mosk Courthouse
111 N. Hill Street, Room 208
Los Angeles, CA 90012

(213) 830-0855

A Conservatorship is a court proceeding in which a Judge appoints a family member, friend, or other responsible person (conservator) to care for another adult (conservatee) who cannot care for themselves and/or their finances.

Probate Code §1826 requires that a probate investigation be conducted when a Petition for Conservatorship is filed with the Court. Before your scheduled hearing date, the Probate Investigator (PI) will schedule a meeting to interview the proposed conservatee in person at their residence or facility. The interview generally lasts approximately one hour.

The PI will meet privately with the proposed conservatee and advise them that a petition has been filed and inquire about whether they support the conservatorship and the proposed conservator.

The PI will also interview in person or by telephone the proposed conservator(s) regarding the reasons the conservatorship is necessary. The PI will also assess the proposed conservatee's living situation, medical and personal care, financial management, other aspects of their life and their relationship with the proposed conservator.

The Probate Investigator will telephonically interview relatives, and other persons, and/or agencies knowledgeable about the conservatee's situation and/or who serve to support or to corroborate information provided.

ON THE DAY OF THE INTERVIEW, THE PROPOSED CONSERVATOR SHALL HAVE AVAILABLE FOR INSPECTION BY THE PROBATE INVESTIGATOR THE MEDICAL RECORDS OF THE PROPOSED CONSERVATEE. THE MEDICAL RECORDS SHOULD INCLUDE THE PHYSICIAN(S) INFORMATION, DIAGNOSES, PRESCRIBED MEDICATIONS, AND OTHER MEDICAL ORDERS.

The Probate Investigator will make a recommendation to the Court regarding the necessity of the conservatorship and the suitability of the proposed conservator. The Probate Investigator may make additional recommendations related to the needs of the proposed conservatee. These recommendations will be provided before your hearing date.

A copy of the PI report will be provided to the Court and mailed to the parties entitled to receive the report.

If the parties are not available for the interview, the Court may decide to proceed with the hearing or to continue the hearing until the Probate Investigation can be completed.

If a conservatorship is granted by the Court, a PI must conduct periodic review investigations, as required by the California Probate Code.

For these review investigations, the Probate Investigator will personally visit the conservatee, and the visits may be unannounced.

The Probate Investigator will investigate whether the conservatorship is still necessary, determine if the care and living situation of the conservatee is appropriate, and determine if the conservator is acting in the conservatee's best interests. The Probate Investigator will then prepare a written report with recommendations for the Court.

For more information about conservatorships, including other options to help, visit the California Courts' Self-Help Page at: <https://selfhelp.courts.ca.gov/helping-person-impairment-or-disability>

For inquiries specific to scheduling of the Probate Investigation, call 213-830-0855.

Probate Investigation reports are mailed to parties entitled to receive them. Reports are also available to the (proposed) conservatee, (proposed) conservator(s), first-degree relatives and spouse or registered partner from the Certifications and Copies of Court Records Office at the Stanley Mosk Courthouse, room 112. Attorneys of Record may access a copy through the Court's Attorney portal.