



SYNDICATE LEGAL SUPPORT SERVICES

Conservatorship

Syndicate Legal Services – Conservatorship



SYNDICATE LEGAL SERVICES

Team of:
Attorneys / Lawyers
Law Clerks
Paralegals
Industry Specialists

We assist individuals, licensed private professional fiduciaries, and entities in connection with Conservatorships of the Person and Conservatorships of the Estate, including the preparation and filing of petitions for the appointment of Conservators of the Person and Conservators of the Estate, and including assistance with the ongoing representation of Conservators of the Person and Conservators of the Estate to assist them with the performance of their duties as Conservators.

Common petitions we assist our clients to prepare and file include (but is not limited to):

- Petition for Appointment of Conservator of the Person and/or Estate
- Accountings (Subscription Clients Only)
- Petitions for Instructions
- Petitions for Fees & Costs
- Petitions for Substituted Judgment
- Petitions for Termination and Distribution

A **Probate Conservatorship** is a formal probate court proceeding where a judge appoints a person or an organization (called the "**Conservator**") to care for another adult (called the "**Conservatee**") who cannot manage his or her own personal care, health care and/or manage his or her own finances. Often the Conservatee is an older person who has impairments relating to the aging process, but the Conservatee may also be a younger individual who, as a result of injury, illness or other circumstances, is unable to care for his or her own personal needs or manage his or her own finances.

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A Conservator of the Person and/or Estate may be appointed for an adult who lacks capacity to make his or her own personal or financial decisions, or for an adult who needs protection from others because he or she has become susceptible to undue influence. We can assist clients explore all other possible avenues for the protection of a vulnerable adult before proceeding with a Conservatorship.

The probate court can appoint a Conservator of the person, a Conservator of the Estate, or both, depending on the type assistance the Conservatee needs.

The duties and responsibilities of a Conservator are extensive and usually demanding. Often, someone close to the incapacitated individual, such as a spouse, registered domestic partner, family or friends will recognize the need for a Conservator and that person (or persons) file a petition to ask that they be appointed as the Conservator for their own spouse, family member or friend.

Other times, a Conservator of the Person or Estate is needed, but there is no one, such as a spouse, family or trusted friend, who is available or willing to serve as Conservator for the incapacitated adult. In this situation, we can assist our clients to identify a professional who may be able to serve as Conservator. We work with several licensed Private Professional Fiduciaries throughout the United States who may be able to help.

Syndicate Legal Services – Custom Legal Documents & Timelines



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Process:

- 1. Client engages Syndicate Legal Services for the legal documents needed.
- 2. Because Syndicate Legal Services provides custom legal documents, a member of Syndicate Legal Services will contact the Client get the information needed to complete the required legal work product. This happens via telephone conference or by video conference.
- 3. Syndicate Legal Services' team members will complete the First Draft of the Custom Legal Documents and send them electronically to the Client for review.
- 4. Client will review the First Draft and request any changes, edits or corrections. Syndicate Legal Services will continue to make corrections, changes and edits to the Legal Documents until the Client approves a Final Draft.
- 5. Once the Client is satisfied with the Legal Documents, Syndicate Legal Services will deliver a Final Draft to the Client along with a "Syndicate Legal Services Certificate of Completion."
- 6. All first drafts are delivered to the Client within 1-3 business days, with the average timeline being within one business day.

Syndicate Legal Services will send Client copies of all completed work, documents and correspondences, as well as other information throughout this Engagement. These copies will be the "Client File" copies. Syndicate Legal Services will also keep the information in the Syndicate Legal Services Corporate Office. The file in the Syndicate Legal Services Corporate Office will be "Our File". Please have the "Client File" available during all of our in-person meetings / video conferences / telephone conferences so that we all have the necessary information available to us. Once Syndicate Legal Services has completed the Legal Support Services detailed in this Engagement Agreement, Syndicate Legal Services will close "Our File" and return any original documents to Client (if any). Syndicate Legal Services will then store the "Our File" for approximately six (6) years. Syndicate Legal Services will destroy the "Our File" after that period-of-time unless Client instructs Syndicate Legal Services in writing to keep the file longer.

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Syndicate Subscription Legal Plans (www.SyndicateLegalPlans.com), Syndicate Legal Support (www.SyndicateLegalSupport.com), Syndicate Custom Legal Documents (www.SyndicateLegalDocuments.com) and Syndicate Legal Services (the collection of the three previously mentioned services and domains / URLs) are each tradenames for "Syndicate Legal & Financial, LLC," a California Limited Liability Company. Syndicate Legal & Financial, LLC is a licensed, bonded & insured Legal Document Assistant Office duly registered in the County of Los Angeles (#2024100564).

BEWARE OF ILLEGAL COMPANIES OFFERING LEGAL DOCUMENT PREPARATION SERVICES. It Is illegal in California to provide self-help legal document preparation services without being a registered and bonded Legal Document Assistant or Law Firm. Paralegals or other companies advertising to consumers that are not licensed or qualified under California law to provide self-help legal document preparation services to consumers are violating California law! See California Business & Professions Code Section 6408.5.

