

INVESTIGATOR'S REPORT

YOU CAN USE THIS PACKET IF ALL THIS IS TRUE:

- The court appointed you investigator in a guardianship and/or conservatorship case.

INSTRUCTIONS

The court may appoint an investigator to investigate the appropriateness of 1) appointing, 2) removing, or 3) accepting the resignation of a guardian and/or conservator of an adult or 4) terminating the guardianship and/or conservatorship. The investigator shall have no personal interest in the proceeding. At the hearing, the ward is entitled to cross-examine the investigator. The ward in a conservatorship case is entitled to see all evidence bearing on their condition.

The investigator also shall arrange to transport the ward as the court directs.

STEP 1: CONDUCT THE INVESTIGATION

- (1) Interview the ward.
- (2) Interview the guardian and/or conservator.
- (3) Visit the ward's current place of residence.
- (4) Visit the ward's proposed place of residence.
- (5) Interview caregivers and the manager or administrator at the nursing or care home, if any.

In conducting interviews, you may examine any relevant court, medical, or financial record.

STEP 2: FILL OUT THE REPORT OF THE COURT-APPOINTED INVESTIGATOR

STEP 3: FILE THE REPORT WITH THE COURT

At least one week before the hearing date listed on the order appointing you, take or mail the original and one copy of the Report to the Clerk of Superior Court, 200 N. San Francisco St., Flagstaff, AZ 86001. The Clerk will stamp your copy with the filing date and return it to you. If you file by mail, include a self-addressed, stamped envelope and a note asking the Clerk to return the copy.

STEP 4: DELIVER THE REPORT TO THE WARD'S ATTORNEY

On the day you file it, mail or hand-deliver a copy of the Report to the ward's attorney (deliver it to the ward if the ward doesn't have an attorney).

Person Filing: _____
Mailing Address: _____
City, State, Zip: _____
Phone Number: _____

SUPERIOR COURT OF ARIZONA, COUNTY OF COCONINO

In the Matter of the Guardianship and/or
Conservatorship of:

Case Number: _____

**REPORT OF THE COURT-APPOINTED
INVESTIGATOR**

An Adult

I am the court-appointed investigator. I have no personal interest in this proceeding. I have conducted an investigation as required by statute. This report concerns:

- Appointing a guardian and/or conservator
- Removing a guardian and/or conservator
- Accepting a guardian and/or conservator's resignation
- Terminating guardianship and/or conservatorship

I reviewed the following documents:

I interviewed the following people:

Background

The ward has lived in a private home boarding home nursing home other:
_____ since this date: _____

Before then the ward lived at:

From this date: _____ To this date: _____ Address: _____

Symptoms of the Ward's Incapacity:

The Guardian and/or Conservator's Relationship to the Ward: _____

When the Ward Became Incapacitated: _____

How the Ward's Incapacity is Being Treated:

Prior Psychological Evaluations of the Ward:

| | | |
|---------------|-------|-----------------|
| Conducted By: | Date: | Major Findings: |
| NAME: _____ | _____ | _____ |
| Title: _____ | _____ | _____ |
| NAME: _____ | _____ | _____ |
| Title: _____ | _____ | _____ |

Findings

Incapacity prevents the ward from providing for the following on their own behalf:

- | | |
|--|--|
| <input type="checkbox"/> Food, clothing, and shelter | <input type="checkbox"/> Medical decisions |
| <input type="checkbox"/> Educational, social, and religious activities | <input type="checkbox"/> Financial decisions |
| <input type="checkbox"/> Other: _____ | |

How the Guardian and/or Conservator Plans to Meet the Ward's Needs:

The ward holds the following opinion and understanding of their incapacity, the guardian and/or conservator, and the guardianship and/or conservatorship:

Whether and How the Guardianship and/or Conservatorship is in the Ward's Best Interest:

Whether the Guardian and/or Conservator is the Most Appropriate Person:

Whether and How the Ward's Current and Proposed Place of Residence are in the Ward's Best Interest:

How the Guardianship Could be Limited:

Considerations on Suspending the Ward's Driver's License:

Whether and How the Ward's Accounts Should be Restricted:

Financial

The ward has an annual income of \$_____ with assets of \$_____

These numbers are from the most recent Inventory of Estate, Guardian's Report, or Conservator's Accounting in the case file.

Medical

The Ward's Diagnosis: _____

It is progressive and incurable.

The Ward's Medications:

Purpose:

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Other Comments

Date: _____

Investigator's Signature: _____