

PROBATE COURT OF FRANKLIN COUNTY, OHIO
JEFFREY D. MACKEY, JUDGE

CONSERVATORSHIP OF _____

CASE NO. _____

ADDITIONAL FINANCIAL INFORMATION
(Conservatorship)

I am the petitioner asking the court to appoint a conservator for me. I need a conservator because:

I understand that the court can appoint a conservator to help with all or part of my money and property. The following is information to help the court and the potential conservator understand my financial situation.

[Check all boxes that apply.]

Benefits:

Social Security: _____ per month

I have a representative payee: _____

P.E.R.S.: _____ per month

V.A. Benefits: _____ per month

Railroad Retirement: _____ per month

Other Pension(s): _____ per month

Source: _____

Medicaid

Other Insurance Benefits: _____

Other: _____

Financial Accounts in my Name:

Institution (PNC, Fidelity, etc.)	Type (checking, brokerage, etc.)	Estimated Balance

Real Estate Interests:

I own real estate located at the following address(es): _____

I receive rental income in the amount of _____ per month.

Estate and Trust Interests:

I am the beneficiary of:

a special needs trust.

any other trust.

a decedent's estate.

Identifying information of the estate or trust (e.g., name of decedent or settlor, case number, court overseeing the trust or estate, name of trustee, etc.): _____

Other Income or Assets (cash, securities, royalties, etc.):

Source and amount: _____

Petitioner