DECLARANT *(Name):* **TITLE:**
INSTITUTION *(Name):*
ADDRESS:
TELEPHONE: FAX *(Optional):*

To keep other people from seeing what you entered on your form, please press the Clear This Form button at the end of the form when finished.

SUPERIOR COURT OF CALIFORNIA, COUNTY OF
STREET ADDRESS:
MAILING ADDRESS:
CITY AND ZIP CODE:
BRANCH NAME:

☐ GUARDIANSHIP ☐ CONSERVATORSHIP OF
(Name):
☐ MINOR ☐ CONSERVATEE

NO FILING FEE

NOTICE OF OPENING OR CHANGING A GUARDIANSHIP OR CONSERVATORSHIP ACCOUNT OR SAFE-DEPOSIT BOX

CASE NUMBER:

NOTE TO FINANCIAL INSTITUTION: When a guardian or conservator of the estate of a person opens or changes the name on an account or a safe-deposit box in a "financial institution" (a bank, a trust, a savings and loan association, a savings bank, an industrial bank, or a credit union), the institution must file a statement with the court having jurisdiction over the proceeding and identified in the *Letters of Guardianship* or *Letters of Conservatorship*. The statement must contain the information specified below concerning each new or existing account or safe-deposit box in the institution. The statement must be signed by an authorized officer of the institution.

1. I am an officer of the financial institution identified in this statement, and I am authorized to sign this statement on its behalf.
2. The guardian or conservator presented *Letters of Guardianship* or *Letters of Conservatorship* identifying the guardian or conservator of the estate of the ward or conservatee named above.
3. a. Financial institution *(name):*
   b. Branch *(name):*
   (street address):
   (city and zip code): *(telephone):*
4. ☐ Account status *(check one; identify additional new or existing accounts on Attachment 4):*
   a. ☐ (1) New account opened on *(date):* reflecting the guardianship or conservatorship.
   (2) Account number:
   b. ☐ (1) Existing account changed on *(date):* to reflect the guardianship or conservatorship.
   (2) Account number: Before change: After change:
   (3) Name on account before change *(state each name):*
   c. Opening balance of new account or balance of existing account immediately after change: $
5. ☐ Safe-deposit box status (*check one. Identify additional safe-deposit boxes on Attachment 5):*
   a. ☐ New box rented on *(date):* reflecting the guardianship or conservatorship.
   b. ☐ Existing box rental changed to reflect the guardianship or conservatorship on *(date):*
   c. New safe-deposit box number or current number after change:
   d. This institution ☐ has ☐ has not been given access to the safe-deposit box identified above.
   (If you checked "has," complete item 5e.)
   e. ☐ The contents of the safe-deposit box identified above are as follows *(list the contents in general terms, such as "currency, coins, jewelry, tableware, insurance policies or certificates, stock certificates, bonds, deeds, and wills"):*
6. Name of each person who opened or whose name was added to above-identified account or safe-deposit box *(state each name):*

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.
Date:

(TYPE OR PRINT NAME OF AUTHORIZED OFFICER) (SIGNATURE OF AUTHORIZED OFFICER)

Form Adopted for Mandatory Use
Judicial Council of California
GC-051 [Rev. July 1, 2005]

NOTICE OF OPENING OR CHANGING A GUARDIANSHIP OR CONSERVATORSHIP ACCOUNT OR SAFE-DEPOSIT BOX
(Probate—Guardianships and Conservatorships)

Probate Code, § 2892
www.courtinfo.ca.gov

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