Checklist: How to Prepare for a Court Investigator Visit

California Guardianship or Conservatorship Case

General Preparation

- Know the purpose of the visit — the investigator is there to assess the well-being of the proposed/protected person and the suitability of the guardian or conservator.
- Understand that the visit may involve separate interviews with the guardian/conservator and the protected person.
- Set aside uninterrupted time for the visit (expect 30–90 minutes).
- Do a light tidy-up of the home, focusing on safety, cleanliness, and accessibility.

Documents to Have Ready

- Government-issued photo ID (for guardian/conservator).
- Proof of residence (recent utility bill, lease, or mortgage statement).
- Guardianship or conservatorship petition (if not yet granted).
- Letters of guardianship or conservatorship (if already appointed).
- Medical records or evaluations related to the proposed conservatee's or minor's condition.
- IEP or care plans (if the person under care is a minor or adult with developmental conditions).
- Financial documents showing how funds are being managed (if guardian/conservator of the estate).
- Medication lists, doctor's names, or therapy schedules (if applicable).

Preparing the Person Under Care

- If appropriate, explain who is coming and why.
- Reassure them that they can speak openly and honestly.
- Help them feel comfortable and safe during the visit.
- Ensure their basic needs (food, hygiene, clothing) are met and visible.

During the Visit

- Answer questions honestly and calmly — it’s okay to say “I’m not sure” or “I need to check on that”.
- Avoid coaching or scripting responses.
- Be open to suggestions or questions — the investigator is not there to “trap” you.
- Be prepared to discuss care routines, safety plans, relationships, and support systems.
- Allow the investigator to speak alone with the protected person if requested.