

**NOTE: Please PRINT legibly and make sure ALL information is correct. Thank you.**

**GUARDIANSHIP/CONSERVATORSHIP CHECKLIST**

Who referred you to *The Law Office of Brown & Brown, P.C.*? \_\_\_\_\_

Name of Petitioner: \_\_\_\_\_  
Social Security Number \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone #: (Home) \_\_\_\_\_ (Cell) \_\_\_\_\_ (Work) \_\_\_\_\_  
Relationship to Incapacitated Person: \_\_\_\_\_

Incapacitated Person Name: \_\_\_\_\_  
Social Security Number \_\_\_\_\_  
Address: \_\_\_\_\_  
Birthdate: \_\_\_\_\_ Age: \_\_\_\_\_  
Nature of Incapacity: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name of Incapacitated Person's Doctor: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone #: \_\_\_\_\_

Name of Spouse of Incapacitated Person (if applicable): \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone #: \_\_\_\_\_

Children of Incapacitated Person (if applicable):  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone #: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone #: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone #: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone #: \_\_\_\_\_ Relationship: \_\_\_\_\_





The Law Office of  
**Brown & Brown, P.C.**

1250 E. Sherwood Drive, Grand Junction, Colorado 81501

Baird B. Brown ❖\*  
Clara Brown Shaffer

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## **Privacy Notice**

Attorneys, like other professionals who advise on personal financial matters, are now required by a new federal law, the Gramm-Leach-Bailey Act, to inform our clients of our policies regarding privacy of client information. By providing estate and tax planning services, financial and economic advisory services, and by preparing tax returns, we receive significant personal financial information from our clients. Attorneys have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by this new law. Therefore, we have, and will in the future, always protect your right to privacy.

### **Information We Collect**

Brown & Brown, P.C. collects nonpublic personal information about you from these sources:

- Information we receive from you, including information on forms that we ask you to complete; and
- Information provided to us by your other advisors, such as accountants, life insurance agents, and investment advisors.

### **Restricted Disclosure**

Brown & Brown, P.C. reveals nonpublic personal information about you only if:

- You request or authorize the disclosure.
- The disclosure is made to help complete a transaction that you initiated.
- The disclosure is permitted or required by law.

### **Our Internal Policies and Security Procedures to Maintain Your Privacy**

We restrict access to nonpublic personal information about you to those employees who need to know the information in order for us to provide legal services to you. We educate our employees about the importance of maintaining client confidentiality and require them to follow our firm policies and the Colorado Rules of Professional Conduct. We maintain physical and procedural safeguards to protect the privacy of information about you.

If you have any questions regarding our policy regarding the professional standards of confidentiality and/or the privacy of information you provide to us, please do not hesitate to contact us.

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❖Fellow, American College of Trust & Estate Counsel  
\*Certified as an Elder Law Attorney by the National Elder Law Foundation