

**PROBATE COURT OF COLUMBIA COUNTY  
STATE OF GEORGIA**

**QUALIFICATIONS QUESTIONNAIRE  
FOR NOMINATED CONSERVATORS**

**IN RE:** \_\_\_\_\_  
**PROPOSED WARD**

**DOCKET NO.** \_\_\_\_\_

**NOMINATED CONSERVATOR:** \_\_\_\_\_

In order to assist the Court in assessing my qualifications to serve as conservator for the above-named Proposed Ward, I submit the following responses to questions and provide the following requested information, under oath:

1. Have you ever filed for bankruptcy? \_\_\_\_ If yes, in what year did you file? \_\_\_\_ Have you been fully and finally discharged? \_\_\_\_\_
  
2. Have you ever held a bonded position? \_\_\_\_ If yes, please describe the position: \_\_\_\_\_  
\_\_\_\_\_.
  
3. Have you ever been fired from a place of employment? \_\_\_\_ If yes, please identify the employer and explain the circumstances of your dismissal: \_\_\_\_\_  
\_\_\_\_\_.
  
4. Have you ever held a general (financial) power of attorney granted to you by another? \_\_\_\_ If so, please state the circumstances and identify your relationship to the person who gave you the power of attorney (you do not have to identify that person by name unless that person is the proposed ward): \_\_\_\_\_  
\_\_\_\_\_  
At any time while holding such power, were you accused by the principal or anyone having an interest in the affairs of the principal of having misused or abused the power? \_\_\_\_ If yes, please explain the allegations made and the resolution or result: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.
  
5. Do you currently maintain one or more checking accounts? \_\_\_\_ If so, in what banks do you have accounts presently open: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.
  
6. Do you regularly enter all deposits, checks and other withdrawals in your personal check register? \_\_\_\_ Do you regularly (not less than quarterly) reconcile your records with those of the bank? \_\_\_\_ Do your records and those of the bank regularly agree? \_\_\_\_\_
  
7. Do you regularly keep all receipts, invoices, bills, statements and other documents for expenses, bills and debts paid by you? \_\_\_\_\_

8. Has any bank ever declined to allow you to open an account, required you to close an account, or closed an account which you had with the bank? \_\_\_\_ If so, please identify each bank and explain the circumstances: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
9. Is your name on any account owned by the proposed ward, either as a joint owner or an authorized signor? \_\_\_\_ If yes, please identify each such account and state whether you claim any ownership interest in the funds on deposit: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
10. Do you own any property, including real property, personal property and intangible property (accounts, stocks, bonds, investments, etc.) jointly with the proposed ward? \_\_\_\_ If yes, please itemize all property jointly owned by you and the proposed ward: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
11. Have you timely filed all income tax returns which you are required to file for the last five years? \_\_\_\_ Have you ever paid a penalty for the late filing of an income tax return? Do you have an outstanding and unpaid debt to the Internal Revenue Service or to the revenue department of any state? \_\_\_\_ If yes, please state the amount owed and the terms of any repayment agreement: \_\_\_\_\_.
12. If you have an attorney representing you in this matter, has your attorney explained to you the limitations on your authority if the Court appoints you as conservator? \_\_\_\_\_
13. Are you aware that, if the Court appoints you as conservator, you will be **required** to file an Inventory and Asset Management Plan within two months of the date of your appointment and annual returns, together with an updated Inventory and Asset Management Plan within 60 days of the anniversary of your qualification each and every year for so long as you serve as conservator? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
14. Do you own or have regular access to a computer? \_\_\_\_ If yes, do you regularly use a cash or money management software such as Microsoft Money ® or Quicken ®? \_\_\_\_ Do you use online banking, if available from your bank(s)? \_\_\_\_\_

Under penalty of perjury, I do swear or affirm that the answers and responses stated above are true and correct to the best of my knowledge and belief.

Sworn to and subscribed before me  
 on \_\_\_\_\_.

\_\_\_\_\_  
 Signature of Nominated Conservator

Notary Public  
 Expiration Date:

[SEAL]