

**4-992. Guardianship and conservatorship information sheet; petition.**  
[For use with Rule 1-003.2 NMRA]

**GUARDIANSHIP AND CONSERVATORSHIP INFORMATION SHEET**  
**(Submit with Petition)**

*Type or print responses. To be submitted with a petition  
for the appointment of a guardian or conservator  
under Chapter 45, Article 5, Parts 3 and 4, NMSA 1978*

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**THIS SECTION FOR OFFICIAL USE ONLY**

NOTE TO COURT CLERK:

DOCKET EVENT CODE \_\_\_\_\_, CRT: G/C Information Sheet (Petition).

***Scan document, but will not become part of the official record.***

Case number: \_\_\_\_\_ Assigned judge: \_\_\_\_\_

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**I. Persons entitled to notice and access to court records until the  
appointment of a guardian or conservator.**

1. Full name, address, and date of birth of person to be protected:
2. Full name and address of petitioner:

For each relationship below, indicate whether the petitioner is aware of anyone with such a relationship to the person to be protected. For each relationship marked  Yes, provide the name and mailing address, if known, of the person with such a relationship to the person to be protected. Attach additional sheets if necessary.

3. Attorney representing the petitioner:  Yes;  No
4. Spouse of the person to be protected:  Yes;  No;  Unknown

If no known spouse, an adult with whom the person is in a long-term relationship of indefinite duration in which the individual has demonstrated an actual commitment to the person to be protected similar to the commitment of a spouse and in which the individual and the person to be protected consider themselves to be responsible for each other's well-being:  Yes;  No;  Unknown

5. Adult children of the person to be protected:  Yes;  No;  Unknown

If no known adult children, each parent and adult sibling of the person to be protected:

Yes;  No;  Unknown

If no known parent or adult sibling, at least one adult nearest in kinship to the person to be protected who can be found with reasonable diligence:

Yes;  No;  Unknown

6. Adult stepchildren of the person to be protected whom the person actively parented during the stepchildren=s minor years and with whom the person had an ongoing relationship in the two-year period immediately preceding the filing of the petition:  Yes;  No;  Unknown
7. A person responsible for the care or custody of the person to be protected:  Yes;  No;  Unknown
8. Any attorney currently representing the person to be protected:  Yes;  No;  Unknown
9. Any representative payee appointed by the federal social security administration for the person to be protected:  Yes;  No;  Unknown
10. A guardian or conservator acting for the person to be protected in New Mexico or in another jurisdiction:  Yes;  No;  Unknown
11. A trustee or custodian of a trust or custodianship of which the person to be protected is a beneficiary:  Yes;  No;  Unknown
12. Any fiduciary for the person to be protected appointed by the federal department of veterans affairs:  Yes;  No;  Unknown
13. An agent designated under a power of attorney for health care in which the person to be protected is identified as the principal:  Yes;  No;  Unknown
14. An agent designated under a power of attorney for finances in which the person to be protected is identified as the principal:  Yes;  No;  Unknown
15. A person nominated as guardian or conservator by the person to be protected:  Yes;  No;  Unknown
16. A person nominated as guardian by the parent or spouse of the person to be protected in a will or other signed record:  Yes;  No;  Unknown
17. A proposed guardian or conservator:  Yes;  No;  Unknown
18. A person known to have routinely assisted the person to be protected with decision making during the six months immediately preceding the filing of the petition:

Yes;  No;  Unknown

19. If the petition is for a guardianship, any person with whom the petitioner seeks to limit contact with the person to be protected:  Yes;  No;  Unknown

**II. Certification/Affirmation.**

I [certify] [affirm under penalty of perjury under the laws of the State of New Mexico] that the information contained herein is complete and accurate to the best of my knowledge and belief. I acknowledge that under Sections 45-5-309(C) and/or 45-5-405(C) NMSA 1978, a copy of the petition and notice of a hearing on the petition must be served on the persons identified in this information sheet.

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Signature of [Petitioner] [Petitioner=s attorney]

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Date of signature

[Approved by Supreme Court Order No. 18-8300-005, effective for all cases filed, or pending but not adjudicated, on or after July 1, 2018.]