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 NMSA 1978, Chapter 45, Article 5, Parts 3 and 4[~~, NMSA 1978~~]

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: _____

I. Acknowledgement that the Petition concerns only one (1) alleged incapacitated person.

[ ] I acknowledge that the Petition seeking appointment of a guardian or conservator that I filed, which I submitted along with this Information Sheet, concerns only one (1) alleged incapacitated person.

[~~I.~~]II. 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; [ ] Unknown

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 (6) 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.~~] III. 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.

_____
Signature of [Petitioner] [Petitioner's attorney]

_____
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; as amended by Supreme Court Order No. S-1-RCR-2023-00045, effective for all cases pending or filed on or after December 31, 2026.]