



Syndicate Subscription Legal Plans

GUARDIANSHIP OF A MINOR **CLIENT INTAKE QUESTIONNAIRE:**

URGENT NEED? If a child needs care now, a TEMPORARY guardianship may be available within days. For school enrollment or medical care only, a relative caregiver may qualify to sign a Caregiver's Authorization Affidavit without going to court. If a child is in danger, call 911.

CONFIDENTIAL. A guardianship allows an adult who is not a child's parent to be appointed by the court to care for the child (guardian of the person) and/or manage the child's money and property (guardian of the estate). A guardianship is NOT an adoption; the parents keep their parental rights and may ask the court to end the guardianship later. The court will review the proposed guardian's background, and a court investigator may visit the home. If a question does not apply, write "N/A."

NAME OF THE CLIENT(s):

You are the:

☐ Proposed guardian(s)

☐ Parent of the child

☐ Current guardian

☐ Other relative

☐ Full Legal Name: _____

☐ Co-applicant (spouse / partner), if any: _____

Address: _____

City: _____ County: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Syndicate Plan Member ID: _____ Primary language: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

PART 1 — WHAT DO YOU NEED?

1.1 Check all that apply:

☐ Guardianship of the PERSON (care & custody)

☐ Guardianship of the ESTATE (money & property)

☐ Both person and estate

☐ Temporary (emergency) guardianship

☐ Caregiver's authorization for school / medical only

☐ Parent nominating a future guardian

☐ End (terminate) a guardianship

☐ Change visitation or terms of a guardianship

☐ Respond to a guardianship petition (as a parent)

☐ Annual accounting / duties as current guardian

1.2 Date guardianship is needed by: _____



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1.3 In your own words, why is a guardianship needed? _____

PART 2 — THE CHILD(REN)

Child's Full Name	Date of Birth	Sex	Current Address / Lives With	Your Relationship

2.1 Where the Child Has Lived — Last 5 Years:

The court must know every place the child has lived in the past 5 years and with whom. List the most recent first.

Dates (from – to)	City, State	Lived With (names / relationship)

2.2 Is the child a member of, or possibly eligible for, a Native American tribe? ☐ Yes ☐ No

Special federal and state protections (ICWA) apply to Native American children in guardianship cases.

2.3 Does the child have special medical, developmental, or educational needs? ☐ Yes ☐ No

If yes, explain: _____

2.4 School and grade: _____ Health insurance: _____

2.5 Is the child 12 or older? What are the child's wishes about the guardianship? ☐ Yes ☐ No

If yes, explain: _____



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PART 3 — THE CHILD’S PARENTS

Parent Information	Mother / Parent 1	Father / Parent 2
Full name		
Address / city / state		
Phone		
Living, deceased, or whereabouts unknown		
Consents to guardianship?		
Currently in contact with the child?		
Incarcerated / in treatment / deployed?		

3.1 Is there any existing custody or support order for the child? ☐ Yes ☐ No

3.2 Has any parent’s parental rights been terminated? ☐ Yes ☐ No

PART 4 — REASONS FOR GUARDIANSHIP

4.1 Check all that apply:

- ☐ Parent(s) deceased
- ☐ Parent incarcerated
- ☐ Parent has a serious illness / disability
- ☐ Substance abuse
- ☐ Abandonment
- ☐ Abuse or neglect
- ☐ Parent requests guardianship
- ☐ Military deployment
- ☐ Parent living abroad / unable to return
- ☐ Other

4.2 Describe the circumstances and how long the child has been in your care: _____

If a parent objects, the court generally must find that parental custody would be harmful to the child and that the guardianship is in the child’s best interest.

PART 5 — RELATIVES WHO MUST RECEIVE NOTICE

The parents, grandparents, and brothers and sisters of the child generally must be notified of the guardianship petition.

Name	Relationship to Child	Address	Phone	Supports / Opposes?

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PART 6 — PROPOSED GUARDIAN BACKGROUND

The court requires a confidential background screening of the proposed guardian. Answer honestly; many issues do not prevent appointment.

Everyone Living in Your Home	Age	Relationship to You	Relationship to Child

6.1 Your occupation / employer: _____ Monthly income: \$ _____

6.2 Has anyone in your home been arrested for or convicted of a crime? ☐ Yes ☐ No

6.3 Has anyone in your home been investigated by CPS or a similar agency? ☐ Yes ☐ No

6.4 Has anyone in your home been the subject of a restraining order? ☐ Yes ☐ No

6.5 (Estate guardianships) Have you filed bankruptcy or had a civil judgment? ☐ Yes ☐ No

If yes to any, explain briefly: _____

6.6 Can you provide appropriate housing, supervision, and schooling for the child? ☐ Yes ☐ No

PART 7 — THE CHILD'S MONEY & PROPERTY (ESTATE)

7.1 Assets or income the child has or will receive:

☐ Inheritance

☐ Life insurance proceeds

☐ Social Security survivor benefits

☐ Lawsuit / injury settlement

☐ Real estate

☐ Trust

☐ None

7.2 Estimated total value: \$ _____ Monthly income: \$ _____

A guardian of the estate must keep the child's property separate, may be required to post a bond or place funds in a blocked account, and must file regular accountings with the court.

PART 8 — EXISTING CASES

Type of Case (CPS / juvenile, custody, prior guardianship, adoption)	Court / County / State	Case No.	Status



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If the child is in a juvenile dependency (CPS) case, a guardianship may need to be handled in juvenile court instead.

PART 9 — PARENT CONTACT & SUPPORT

9.1 Proposed contact between the child and parents:

☐ Regular visitation

☐ Supervised visitation

☐ No contact (safety concerns)

☐ To be decided

9.2 Will you ask for child support from the parents?

☐ Yes ☐ No

9.3 Do you expect the parents to seek to end the guardianship in the future?

☐ Yes ☐ No

If yes, explain: _____

PART 10 — DOCUMENT CHECKLIST

Please provide copies of the following, if available. Check each item you are including.

☐ Child's birth certificate

☐ Parent consent / nomination forms

☐ Parent death certificate(s)

☐ Existing custody / court orders

☐ School & medical records

☐ CPS / police reports

☐ Documents showing child's assets

☐ Tribal enrollment documents

☐ Your photo ID

☐ Proof of residence

Certification:

I/We declare that the information provided in this questionnaire is true, correct, and complete to the best of my/our knowledge. I/We understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating a guardianship matter.

Signed and dated this ____ day of _____, 20__

Signature (Applicant): _____

Print Name: _____

Signature (Co-applicant): _____

Print Name: _____

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save this document as a PDF and email to STEVE@STEVEMUELLERLEGAL.COM,
Your information will be reviewed within one hour.