

STATE OF MAINE

_____ "COUNTY PROBATE COURT¹ DOCKET NO. _____

IN RE: _____ PHYSICIAN'S /PSYCHOLOGIST'S
GUARDIAN /CONSERVATOR
PROCEEDING²

I, _____, am a physician/psychologist
licensed to practice in Maine, having an office at _____.

My professional relationship with the above-named person is as follows:

I examined her/him on _____.

I found the following:

1. History pertinent to current condition:

2. Diagnosis:

3. Prognosis

4. If the appointment of a guardian is sought (answer either A **OR** B):³
- ___ A. It is my opinion that the mental and functional condition of the above-named person to care for himself/herself and/or to make, communicate or implement decisions about her/his well-being is limited., and s/he is incapable of performing ANY of the tasks listed in 4(B). **OR**
- ___ B. I have checked below all things I believe the patient does possess sufficient mental and physical capacity to perform, and I have indicated when appropriate, whether such functions can be performed only with assistance:
- ___ (1) Establish his/her place of abode.
 - ___ (2) Place himself/herself in any hospital or any other institution
 - ___ (3) Make provisions for his /her care, comfort and maintenance.
 - ___ (4) Give or withhold consents or approvals related to medical or other professional care, counsel, treatment or service.
 - ___ (5) To manage, protect, and expend assets and income consistent with 18-A M.R.S.A. § 5-312.

5. If the appointment of a conservator is sought (answer either A **OR** B):⁴
- ___ A. It is my opinion that the mental and functional condition of the above-named person to manage his/her property and financial affairs is limited and that s/he is incapable of performing any of the tasks listed in 5(B). **OR**
- ___ B. I have checked below all things I believe the patient does possess sufficient mental and physical capacity to perform, and I have indicated when appropriate, whether such functions can be performed only with assistance.
- ___ (1) Receive money and tangible property and apply the money and property for his/her support, care and education.
 - ___ (2) Collect, hold and retain assets (including real estate).
 - ___ (3) Deposit and withdraw funds.
 - ___ (4) Invest and reinvest his/her assets.
 - ___ (5) Dispose of assets.
 - ___ (6) Pay bills.
 - ___ (7) Establish and use credit and borrow money.
 - ___ (8) Pay, settle, prosecute or contest any claim.
 - ___ (9) Sell or exercise stock subscription or conversion rights.
 - ___ (10) Enter into any contract, financial commitment or lease.
 - ___ (11) participate in the operation of any business enterprise.
 - ___ (12) Vote a security, in person or by general or limited proxy.
 - ___ (13) Make ordinary or extraordinary repairs or alterations to or in buildings or other structures belonging to him/her.
 - ___ (14) Employ persons, including attorneys, auditors, investment advisors or agents, to advise or assist her/him.

Dated: _____

Physician/Psychologist

¹ See M.R.Prob.P. 84 (Official form may serve as guide.); *see also* Mitchell and Hunt, *Maine Probate Procedure: Guide to Official and Recommended Forms* § 1.01 (These Waldo County's revised forms are non-mandatory, simply preferred for the uniform citation(s) and formatting for interactive use online.).

² See 18-A M.R.S.A. §§5-303 and 5-407 (Report due to court and parties 10 days before hearing.).

³ See 18-A M.R.S.A. §5-304(a) (The development of maximum self-reliance and independence of the patient must be encouraged whenever possible.).

⁴ See 18-A M.R.S.A. §5-408.

I certify that I have made no alteration to the official form as most recently approved and promulgated by the Supreme Judicial Court (and as reproduced for interactive format by Waldo County Probate Court). I also certify that I have met the standards under M.R.Prob.P. 84(b).

Preparer Signature

Typed or Printed Name of Preparer