



STEVE MUELLER'S –
SYNDICATE LEGAL SERVICES

CONSERVATORSHIP

Syndicate Legal Services – Conservatorship



SYNDICATE LEGAL SERVICES

Team of:
Attorneys / Lawyers
Law Clerks
Paralegals
Industry Specialists

We assist individuals, licensed private professional fiduciaries, and entities in connection with **Conservatorships of the Person** and **Conservatorships of the Estate**, including the preparation and filing of petitions for the appointment of Conservators of the Person and Conservators of the Estate, and including assistance with the ongoing representation of Conservators of the Person and Conservators of the Estate to assist them with the performance of their duties as Conservators.

Common petitions we assist our clients to prepare and file include (but is not limited to):

- Petition for Appointment of Conservator of the Person and/or Estate
- Accountings (Subscription Clients Only)
- Petitions for Instructions
- Petitions for Fees & Costs
- Petitions for Substituted Judgment
- Petitions for Termination and Distribution

A **Probate Conservatorship** is a formal probate court proceeding where a judge appoints a person or an organization (called the “**Conservator**”) to care for another adult (called the “**Conservatee**”) who cannot manage his or her own personal care, health care and/or manage his or her own finances. Often the Conservatee is an older person who has impairments relating to the aging process, but the Conservatee may also be a younger individual who, as a result of injury, illness or other circumstances, is unable to care for his or her own personal needs or manage his or her own finances.

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A Conservator of the Person and/or Estate may be appointed for an adult who lacks capacity to make his or her own personal or financial decisions, or for an adult who needs protection from others because he or she has become susceptible to undue influence. We can assist clients explore all other possible avenues for the protection of a vulnerable adult before proceeding with a Conservatorship.

The probate court can appoint a Conservator of the person, a Conservator of the Estate, or both, depending on the type assistance the Conservatee needs.

The duties and responsibilities of a Conservator are extensive and usually demanding. Often, someone close to the incapacitated individual, such as a spouse, registered domestic partner, family or friends will recognize the need for a Conservator and that person (or persons) file a petition to ask that they be appointed as the Conservator for their own spouse, family member or friend.

Other times, a Conservator of the Person or Estate is needed, but there is no one, such as a spouse, family or trusted friend, who is available or willing to serve as Conservator for the incapacitated adult. In this situation, we can assist our clients to identify a professional who may be able to serve as Conservator. We work with several licensed Private Professional Fiduciaries throughout the United States who may be able to help.

ABOUT OUR MANAGING PARTNER

Mr. Steven Mueller is a Lawyer, Co-Founder & Senior Managing Partner of **Syndicate Legal Services** (www.SteveMuellerLegal.com). Mr. Mueller has more than twenty-five years of Law Office experience, including (but not limited to) 20 years of experience in Corporate & Investment Banking Law; 15 years of experience in Civil Litigation; 5 years of experience in person injury law, family law, and employment law; and 3 years of experience in Criminal Defense Law.

Mr. Mueller is a true pioneer in the Private and Public Capital Markets industry with more than twenty years of industry experience. Mr. Mueller has extensive experience in Alternative Trading Systems and Stock Exchange Legal & Compliance, structuring private and public securities offerings, and coordinating both public and private securities offerings through a syndicate network of FINRA Registered Broker Dealers, Investment Banks and Registered Investment Advisors. As of today, Mr. Mueller has participated approximate 200 IPOs and Rule 144A Equity Offerings, and nearly 2,500 capital markets transactions.

In addition, Mr. Mueller has completed the following courses: BA in Corporate Finance w/ Minor in Accounting (South Carolina); Law School (California Southern Law School); Three Years Law Office Study Program (LA Law, Beverly Hills); Paralegal & Advanced Paralegal Studies Certificates; FINRA series 6, 65 & 7; California Insurance (Property & Casualty, Life & Health, Commercial, Annuity, Earthquake, Flood & Long-Term Care); California Real Estate Sales; California Residential Mortgage; and California Bail Bonds. Mr. Mueller is also a United States Marine Corps Veteran (95-99, honorable discharge after completion of 4yr. tour of duty).



Mr. Steven J. Mueller
*Lawyer, Co-Founder &
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