

***PROBATE INVESTIGATOR***

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**DEFINITION**

Under direction, the Probate Investigator will conduct investigations for probate conservatorships, probate guardianships; prepare comprehensive reports and recommendations; consult with Judicial Officers, attorneys, and other involved parties; attend hearings as necessary and complete other duties as required.

**DISTINGUISHING CHARACTERISTICS**

This single level classification is responsible for independently applying investigation techniques that include the ability to fact-find, analyze, review information and make recommendations. Incumbents are required to prepare comprehensive reports for judicial officers.

**TYPICAL TASKS**

- Review case information regarding probate guardianship, probate conservatorship and stepparent adoptions including pleadings, questionnaires, minute orders and other supporting documents
- Conduct field and office visits to interview individuals and assess health status and living conditions
- Review financial and medical records; arrange for interviews of parties outside the San Luis Obispo area
- Review financial accounts filed by guardians and conservators to ensure that the estate is being properly managed, investments are in compliance with the law, and the account is accurate. Notify the court of discrepancies and make surcharge recommendations as necessary
- Gather information from various agencies during investigations including, but not limited to, employers, schools, Adult Protective Services, Child Welfare Services, law enforcement, physicians, care providers, Public Guardian and other professionals
- Review filings in other court departments for any protective/restraining orders or other safety issues for any relevant party. Review custody/visitation orders in family law cases and notify the probate judge in guardianship matters when appropriate
- Prepare memos and special reports to court; prepare recommendations and present them in written and verbal form; inform concerned parties of laws, regulations, and procedures of the court; explain scope of services and legal rights to conservatees
- Inform concerned parties of laws, regulations, and the procedures of the court; explain scope of services and legal rights to conservatees
- Provide information on the nature of probate conservatorship and probate guardianship proceedings to families, parties and attorneys
- Monitor changes to probate law, recommend policy, rules and procedural changes required for compliance and institute such modifications after approval

- Review changes in legislation and case law, and implement changes in local procedures
- Maintain and update the mandated “Resource Directory” and the self-represented information packets
- Testify in court

## **EMPLOYMENT STANDARDS**

### **Knowledge of:**

- Legal terminology, documents, and procedures pertaining to case evaluation and processing; laws, legal/judicial procedure and local rules
- Child abuse/abandonment issues, dependent adult/elder abuse, drug/alcohol issues and reporting responsibilities
- Medical/psychiatric terms and conditions
- Assessment and analytical skills
- Interviewing and investigation techniques
- Basic accounting and auditing skills

### **Ability to:**

- Interact effectively with individuals with diverse backgrounds
- Explain legal rights and court procedures
- Determine acceptability of legal documents for filing, examine and determine if the contents of probate files are consistent with statutory procedural requirements
- Identify need for judicial action and substantiate cause of action

## **PHYSICAL CHARACTERISTICS**

Strength, dexterity, coordination and vision to use a keyboard and video display terminal on a daily basis. Hearing to communicate effectively. Flexibility to reach or grasp equipment and supplies surrounding desk. Occasional lifting of objects weighing up to 10 lbs., such as files, stacks of papers, reference and other materials. Moving from place to place within an office; sitting for prolonged periods of time.

## **EXPERIENCE/EDUCATION**

A Bachelor of Arts or Bachelor of Science degree in a science, a social science, a behavioral science, liberal arts, or nursing from an accredited educational institution; **AND**

A minimum of two years’ employment experience performing casework or investigations in a legal, financial, law enforcement, or social services setting.

## **ADDITIONAL REQUIREMENTS**

Must possess a valid class “C” California driver’s license.