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SENATE BILL NO. 302

AMENDMENT IN THE NATURE OF A SUBSTITUTE

(Proposed by the Senate Committee on the Judiciary  
on February 14, 2022)

(Patron Prior to Substitute—Senator Deeds)

A BILL to amend and reenact §§ 64.2-2002 and 64.2-2009 of the Code of Virginia, relating to petitions for guardianship; appointment of guardians.

Be it enacted by the General Assembly of Virginia:

1. That §§ 64.2-2002 and 64.2-2009 of the Code of Virginia are amended and reenacted as follows: § 64.2-2002. Who may file petition; contents.

A. Any person, including a community services board and any other local or state governmental agency, may file a petition for the appointment of a guardian, a conservator, or both.

B. A petition for the appointment of a guardian, a conservator, or both, shall state the petitioner's name, place of residence, post office address, and relationship, if any, to the respondent and, to the extent known as of the date of filing, shall include the following:

1. The respondent's name, date of birth, place of residence or location, post office address, and the sealed filing of the social security number;

2. The basis for the court's jurisdiction under the provisions of Article 2 (§ 64.2-2105 et seq.) of Chapter 21;

3. The names and post office addresses of the respondent's spouse, adult children, parents, and adult siblings or, if no such relatives are known to the petitioner, at least three other known relatives of the respondent, including stepchildren. If a total of three such persons cannot be identified and located, the petitioner shall certify that fact in the petition, and the court shall set forth such finding in the final order;

4. The name, place of residence or location, and post office address of the individual or facility, if any, that is responsible for or has assumed responsibility for the respondent's care or custody;

5. The name, place of residence or location, and post office address of any agent designated under a durable power of attorney or an advance directive of which the respondent is the principal, and any guardian, committee, or conservator currently acting, whether in this state or elsewhere, and the petitioner shall attach a copy of any such durable power of attorney, advance directive, or order appointing the guardian, committee, or conservator, if available;

6. The type of guardianship or conservatorship requested and a brief description of the nature and extent of the respondent's alleged incapacity;

7. When the petition requests appointment of a guardian, a brief description of the services currently being provided for the respondent's health, care, safety, or rehabilitation and, where appropriate, a recommendation as to living arrangements and treatment plan;

8. If the appointment of a limited guardian is requested, the specific areas of protection and assistance to be included in the order of appointment and, if the appointment of a limited conservator is requested, the specific areas of management and assistance to be included in the order of appointment;

9. The name and post office address of any proposed guardian or conservator or any guardian or conservator nominated by the respondent and that person's relationship to the respondent;

10. The native language of the respondent and any necessary alternative mode of communication;

11. A statement of the financial resources of the respondent that shall, to the extent known, list the approximate value of the respondent's property and the respondent's anticipated annual gross income, other receipts, and debts;

12. A statement of whether the petitioner believes that the respondent's attendance at the hearing would be detrimental to the respondent's health, care, or safety; and

13. A request for appointment of a guardian ad litem.

§ 64.2-2009. Court order of appointment; limited guardianships and conservatorships.

A. The court's order appointing a guardian or conservator shall (i) state the nature and extent of the person's incapacity; (ii) define the powers and duties of the guardian or conservator so as to permit the incapacitated person to care for himself and manage property to the extent he is capable; (iii) specify whether the appointment of a guardian or conservator is limited to a specified length of time, as the court in its discretion may determine; (iv) specify the legal disabilities, if any, of the person in connection with the finding of incapacity, including but not limited to mental competency for purposes of Article II, Section 1 of the Constitution of Virginia or Title 24.2; (v) include any limitations deemed appropriate following consideration of the factors specified in § 64.2-2007; (vi) set the bond of the guardian and the bond and surety, if any, of the conservator; and (vii) where a petition is brought prior to the incapacitated person's eighteenth birthday, pursuant to subsection C of § 64.2-2001, whether the

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60 order shall take effect immediately upon entry or on the incapacitated person's eighteenth birthday.

61 B. The court may appoint a limited guardian for an incapacitated person who is capable of  
62 addressing some of the essential requirements for his care for the limited purpose of medical decision  
63 making, decisions about place of residency, or other specific decisions regarding his personal affairs.  
64 The court may appoint a limited conservator for an incapacitated person who is capable of managing  
65 some of his property and financial affairs for limited purposes that are specified in the order.

66 C. Unless the guardian has a professional relationship with the incapacitated person or is employed  
67 by or affiliated with a facility where the person resides, the court's order may authorize the guardian to  
68 consent to the admission of the person to a facility pursuant to § 37.2-805.1, upon finding by clear and  
69 convincing evidence that (i) the person has severe and persistent mental illness that significantly impairs  
70 the person's capacity to exercise judgment or self-control, as confirmed by the evaluation of a licensed  
71 psychiatrist; (ii) such condition is unlikely to improve in the foreseeable future; and (iii) the guardian  
72 has formulated a plan for providing ongoing treatment of the person's illness in the least restrictive  
73 setting suitable for the person's condition.

74 D. A guardian need not be appointed for a person who has appointed an agent under an advance  
75 directive executed in accordance with the provisions of Article 8 (§ 54.1-2981 et seq.) of Chapter 29 of  
76 Title 54.1, unless the court determines that the agent is not acting in accordance with the wishes of the  
77 principal or there is a need for decision making outside the purview of the advance directive. *A*  
78 *guardian need not be appointed for a person where a health care decision is made pursuant to the*  
79 *Health Care Decisions Act (§ 54.1-2981 et seq.) unless the court determines that the decision is not in*  
80 *accordance with the wishes of the principal.*

81 A conservator need not be appointed for a person (i) who has appointed an agent under a durable  
82 power of attorney, unless the court determines pursuant to the Uniform Power of Attorney Act  
83 (§ 64.2-1600 et seq.) that the agent is not acting in the best interests of the principal or there is a need  
84 for decision making outside the purview of the durable power of attorney or (ii) whose only or major  
85 source of income is from the Social Security Administration or other government program and who has  
86 a representative payee.

87 E. All orders appointing a guardian shall include the following statements in conspicuous bold print  
88 in at least 14-point type:

89 "1. Pursuant to § 64.2-2009 of the Code of Virginia, \_\_\_\_\_ (name of guardian), is hereby  
90 appointed as guardian of \_\_\_\_\_ (name of respondent) with all duties and powers granted to a  
91 guardian pursuant to § 64.2-2019 of the Code of Virginia, including but not limited to: (enter a  
92 statement of the rights removed and retained, if any, at the time of appointment; whether the  
93 appointment of a guardian is a full guardianship, public guardianship pursuant to § 64.2-2010 of the  
94 Code of Virginia, limited guardianship pursuant to § 64.2-2009 of the Code of Virginia, or temporary  
95 guardianship; and the duration of the appointment).

96 2. Pursuant to the provisions of subsection E of § 64.2-2019 of the Code of Virginia, a guardian, to  
97 the extent possible, shall encourage the incapacitated person to participate in decisions, shall consider the  
98 expressed desires and personal values of the incapacitated person to the extent known, and shall not  
99 unreasonably restrict an incapacitated person's ability to communicate with, visit, or interact with other  
100 persons with whom the incapacitated person has an established relationship.

101 3. Pursuant to § 64.2-2020 of the Code of Virginia, an annual report shall be filed by the guardian  
102 with the local department of social services for the jurisdiction where the incapacitated person resides.

103 4. Pursuant to § 64.2-2012 of the Code of Virginia, all guardianship orders are subject to petition for  
104 restoration of the incapacitated person to capacity; modification of the type of appointment or areas of  
105 protection, management, or assistance granted; or termination of the guardianship."

106 **2. That the Department of Behavioral Health and Developmental Services shall convene a work**  
107 **group to consider issues related to (i) the care of adults with permanent disabilities that render**  
108 **them incapable of making informed decisions about their own care and (ii) potential changes to**  
109 **guardianship requirements to make it easier for parents to care for their adult children with such**  
110 **disabilities. The work group shall include representatives from the Joint Legislative Audit and**  
111 **Review Commission, the Department for Aging and Rehabilitative Services, the Department of**  
112 **Social Services, the Department of Medical Assistance Services, the Office of the Executive**  
113 **Secretary of the Supreme Court of Virginia, the Virginia Poverty Law Center, the Virginia**  
114 **Disability Law Center, the Virginia Academy of Elder Law Attorneys, the Virginia Board for**  
115 **People with Disabilities, and The Arc of Virginia. The work group shall make recommendations**  
116 **for legislative changes to address these issues by November 1, 2022, to the Chairmen of the Senate**  
117 **Committee on the Judiciary and the House Committee for Courts of Justice.**