

IN THE CHANCERY (PROBATE) COURT FOR SUMNER COUNTY TENNESSEE
AT GALLATIN

CONSERVATORSHIP / GUARDIANSHIP INVENTORY

IN THE CONSERVATORSHIP / GUARDIANSHIP OF:

DOCKET NO: _____

PERSONAL PROPERTY

Except as directed below, list all personal property of the Ward of whatever kind. If the Ward has no property in one or more of the categories, place an "x" in the appropriate position in the column labeled "None." If additional space is needed in any category, attach a separate sheet properly identified with the case name, case number, and the number of the category. If the Ward is married, state whether the husband, wife, or both own the property by placing an "H," "W" or "J" in the column labeled "Husband, Wife or Joint."

If the property is being held for the Ward by someone else, state that person's name and address under "Description and Location of Property."

TYPE OF PROPERTY	N O N E	H U S B A N D W I F E / J O I N T	DESCRIPTION AND LOCATION OF PROPERTY (Continuation Sheets May Be Attached)	CURRENT ESTIMATED VALUE OF WARD'S INTEREST IN PROPERTY, WITHOUT DEDUCTING ANY ENCUMBRANCES
1. Cash on hand.	---	---	_____	\$ _____
2. Checking, savings or other financial accounts, certificates of deposit or shares in banks, savings and loan, thrift, building and loan, and home-stead associations, or credit unions, brokerage houses or cooperatives. Please itemize each acct and give particulars.	---	---	_____	\$ _____
	---	---	_____	\$ _____
	---	---	_____	\$ _____
	---	---	_____	\$ _____
	---	---	_____	\$ _____
	---	---	_____	\$ _____
	---	---	_____	\$ _____
3. Security deposits with public utilities, telephone companies, landlords, and others.	---	---	_____	\$ _____
	---	---	_____	\$ _____
	---	---	_____	\$ _____
	---	---	_____	\$ _____
4. Household goods and furnishings, including audio, video, and computer equipment.	---	---	_____	\$ _____
	---	---	_____	\$ _____
	---	---	_____	\$ _____
	---	---	_____	\$ _____
5. Books; pictures and other art objects; antiques; stamp, coin, record, and other collectibles.	---	---	_____	\$ _____
	---	---	_____	\$ _____
	---	---	_____	\$ _____
	---	---	_____	\$ _____
6. Safety deposit box. Please itemize contents.	---	---	_____	\$ _____
	---	---	_____	\$ _____

- | | | |
|---------------------------------|-------|----------|
| 7. Furs and jewelry. Please | _____ | \$ _____ |
| itemize and give particulars. | _____ | \$ _____ |
| 8. Firearms and sports, | _____ | \$ _____ |
| photographic, and other | _____ | \$ _____ |
| hobby equipment. | _____ | \$ _____ |
| 9. Interests in insurance | _____ | \$ _____ |
| policies. Name insurance | _____ | \$ _____ |
| company of each policy | _____ | \$ _____ |
| and itemize surrender or | _____ | \$ _____ |
| refund value of each. | _____ | \$ _____ |
| 10. Annuities. Itemize and | _____ | \$ _____ |
| name each issuer. | _____ | \$ _____ |
| 11. Interests in an education | _____ | \$ _____ |
| IRA as defined in | _____ | \$ _____ |
| 26 U.S.C. §530(b)(1) or | _____ | \$ _____ |
| under a qualified State | _____ | \$ _____ |
| tuition plan as defined in | _____ | \$ _____ |
| 26 U.S.C. §529(b)(1). | _____ | \$ _____ |
| Give particulars. (File | _____ | \$ _____ |
| separately the record(s) | _____ | \$ _____ |
| of any such interests(s)). | _____ | \$ _____ |
| 12. Interests in IRA, ERISA, | _____ | \$ _____ |
| Keogh, or other pension | _____ | \$ _____ |
| or profit sharing plans. | _____ | \$ _____ |
| Please itemize. | _____ | \$ _____ |
| 13. Stock and interests in | _____ | \$ _____ |
| incorporated and unin- | _____ | \$ _____ |
| corporated businesses. | _____ | \$ _____ |
| Please itemize. | _____ | \$ _____ |
| 14. Interests in partnerships | _____ | \$ _____ |
| or joint ventures. Itemize. | _____ | \$ _____ |
| 15. Government and | _____ | \$ _____ |
| corporate bonds and | _____ | \$ _____ |
| other negotiable and non- | _____ | \$ _____ |
| negotiable instruments. | _____ | \$ _____ |
| Please itemize. | _____ | \$ _____ |
| 16. Accounts receivable. | _____ | \$ _____ |
| 17. Alimony, maintenance, | _____ | \$ _____ |
| support, and property | _____ | \$ _____ |
| settlements to which the | _____ | \$ _____ |
| Ward is or may be | _____ | \$ _____ |
| entitled. Give particulars. | _____ | \$ _____ |
| 18. Other liquidated debts owed | _____ | \$ _____ |
| to Ward, including tax | _____ | \$ _____ |
| refunds. Give particulars. | _____ | \$ _____ |

19. Equitable or future interests, life estates, and rights or powers exercisable for the benefit of the Ward other than those listed in Real Property below.	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
20. Contingent and non-contingent interests in estate of a decedent, death benefit plan, life insurance policy, or trust.	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
21. Other contingent and unliquidated claims of every nature, including tax refunds, counterclaims of the Ward, and rights to setoff claims. Give estimated value of each.	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
22. Patents, copyrights, royalties, and other intellectual property. Give particulars.	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
23. Licenses, franchises, and other general intangibles. Give particulars.	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
24. Automobiles, trucks, trailers, and other vehicles and accessories. Please itemize.	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
25. Boats, motors, and accessories. Please itemize.	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
26. Aircraft and accessories.	_____	_____	\$ _____
27. Office equipment, furnishings and supplies.	_____	_____	\$ _____
	_____	_____	\$ _____
28. Machinery, fixtures, equipment, inventory, and supplies used in business.	_____	_____	\$ _____
	_____	_____	\$ _____
	_____	_____	\$ _____
29. Livestock.	_____	_____	\$ _____
30. Crops – growing or harvested. Give particulars.	_____	_____	\$ _____
	_____	_____	\$ _____
31. Farming equipment and implements.	_____	_____	\$ _____
	_____	_____	\$ _____

- 32. Farm supplies, chemicals, and feed. _____ \$ _____
- 33. Other personal property of any kind not already listed. Please itemize. _____ \$ _____

____ continuation sheets attached. Total from attachments > \$ _____

TOTAL PERSONAL PROPERTY > \$ _____

REAL PROPERTY

Except as directed below, list all real property in which the Ward has any legal, equitable, or future interest, including all property owned as a co-tenant, community property, or in which the Ward has a life estate. Include any property in which the Ward holds rights and powers exercisable for the Ward's own benefit. If the Ward is married, state whether the husband, wife, or both own the property by placing an "H," "W" or "J" in the column labeled "Husband, Wife or Joint." If the Ward holds no interest in real property, write "None" under "Description and Address of Property."

	DESCRIPTION AND ADDRESS OF PROPERTY	LIENHOLDER (if applicable)	HUSBAND, WIFE, JOINT	CURRENT VALUE OF WARD'S INTEREST IN PROPERTY WITHOUT DEDUCTING ANY ENCUMBRANCES
1.				\$
2.				\$
3.				\$
4.				\$
5.				\$
6.				\$
7.				\$
8.				\$
9.				\$
10.				\$
TOTAL REAL PROPERTY >				

INCOME SOURCES

The Ward receives the following as income, pension, social security, or other sources:

	AMOUNT		FREQUENCY		SOURCE
\$		per		from	
\$		per		from	
\$		per		from	
\$		per		from	
\$		per		from	
\$	0.00	< TOTAL MONTHLY INCOME			

The foregoing is a full, true and perfect *Inventory* of all of the goods and chattels, rights and credits of this Estate which have come to my knowledge or possession to the best of my knowledge and belief, this _____ day of _____, 20_____.

Signature of FIDUCIARY

Sworn to and subscribed before me, this _____ day of _____, 20_____.

NOTARY PUBLIC

My Commission Expires: _____

By: _____ D.C.

APPROVED FOR RECORDING

By: _____
Probate Judge / Probate Master

CERTIFICATE OF SERVICE

[YOU MUST MAIL A COPY OF THIS ENTIRE DOCUMENT TO ALL INTERESTED PARTIES AND COMPLETE THIS CERTIFICATE VERIFYING THE DATE MAILED AND PARTIES IT WAS MAILED TO.]

I hereby certify that a true and exact copy of the foregoing *Inventory* has been served by U.S. Mail, postage prepaid, upon the interested parties listed below.

(SIGNATURE)
DATE: _____

NAME: _____
ADDRESS: _____

NAME: _____
ADDRESS: _____

NAME: _____
ADDRESS: _____

NAME: _____
ADDRESS: _____

NAME: _____
ADDRESS: _____

NAME: _____
ADDRESS: _____

NAME: _____
ADDRESS: _____

NAME: _____
ADDRESS: _____

[ADD ADDITIONAL PAGE(S) FOR LISTING OF INTERESTED PARTIES, IF NECESSARY]