

IN THE CHANCERY COURT OF _____ COUNTY
_____ JUDICIAL DISTRICT

IN RE: CONSERVATORSHIP FOR

Case No. _____

INVENTORY REPORT

On _____, the Court appointed _____ to serve as conservator for _____. The attached Exhibit A is an inventory of the estate. The inventory totals are as follows:

Total Assets	_____
Total Debts and Liabilities	_____
Total Estimated Annual Receipts and Income	_____
Total Estimated Annual Expenses	_____

Unless waived by the Court, an accounting is due on or before _____

(one year from the date of the order appointing the conservator).

Respectfully submitted,

By: _____
Conservator's Name

By: _____
Attorney's Name and Bar No.
Address
Phone
Email

CERTIFICATE OF SERVICE

I certify that on this date, I served a copy of this inventory report as set forth in § 93-20-420(2)

to _____, by _____ (method of service).

This the ____ day of _____.

Attorney's Name

GENERAL INFORMATION

Ward's Contact Information

Name: _____ Date of Birth: _____

Address: _____

(Include name of living center or nursing home, if applicable)

City: _____ State: _____ Zip Code: _____

Phone: Residence _____ Work _____ Cell _____

Email: _____

Last four digits of Social Security No. _____

Spouse and Family Contact Information

Spouse Name: _____ Date of Birth: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: Residence _____ Work _____ Cell _____

Email: _____

Child Name: _____ Date of Birth: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____

Child Name: _____ Date of Birth: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____

Child Name: _____ Date of Birth: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____

Child Name: _____ Date of Birth: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____

Conservator's Contact Information

Name: _____ Date of Birth: _____
Occupation: _____ Relationship to Ward: _____
Address: _____
City: _____ State: _____ Zip Code: _____
Phone: Residence _____ Work _____ Cell _____
Email: _____
Last four digits of Social Security No. _____

Other Information

Please provide the following:

- (1) Has a conservator been appointed for the estate? Yes No
If yes, provide the conservator's name, address, and phone number.

- (2) Do you believe the estate's assets are sufficient to provide for the ward's present and future care? Yes No
Please explain as needed.

- (3) Please list anything of significant value which the conservator, any individual who resides with the conservator, or the spouse, parent, child, or sibling of the conservator has received from a person providing goods or services to the ward.

(4) Please disclose any business dealings the conservator has with a person the conservator has paid or that has benefitted from the property of the ward.

(5) Is any co-conservator or successor conservator appointed to serve when a designated event occurs alive and able to serve? Yes No
If yes, please state that person's name.

(6) Unless bond either has been waived or is not required, state the amount and attach a copy of the bond to the inventory.

(7) Do you anticipate filing a supplemental inventory? Yes No

(8) Please provide any other information you believe the Court should know.

ASSETS

Real Property

Description	County	State	Joint Owner (if any)	Estimated Value
Parcel 1				
Parcel 2				
Parcel 3				
Total \$				_____

Automobiles

Year/Make/Model	V.I.N.	Joint Owner (if any)	Estimated Value
Auto 1			
Auto 2			
Auto 3			
Total \$			_____

Checking Accounts/Savings Accounts/Money Market Accounts/Certificates of Deposit

Bank/Financial Institution/Broker	Acct No.	Joint Owner (if any)	Estimated Value
Account 1			
Account 2			
Account 3			
Total \$			_____

Stocks/Bonds/Investments (including retirement and profit-sharing accounts)

Firm/Institution/Company/Issuer	Acct No./Shares	Joint Owner (if any)	Estimated Value
Account 1			
Account 2			
Account 3			
Total \$			_____

Life Insurance/Annuities

	Company	Type of Policy	Joint Owner (if any)	Cash Value
Policy 1				
Policy 2				
Policy 3				
				Total \$ _____

Other Property (if worth more than \$1,000)

	Detailed Description	Estimated Value
Item 1		
Item 2		
Item 3		
		Total \$ _____

Total Assets \$ _____

DEBTS AND LIABILITIES

Secured Debts

	Obligor/Payee	Collateral	Joint Owner (if any)	Approx. Balance
Debt 1	_____	_____	_____	_____
Debt 2	_____	_____	_____	_____
Debt 3	_____	_____	_____	_____
			Total \$	_____

Unsecured Debts

	Obligor/Payee	Acct. No.	Joint Owner (if any)	Approx. Balance
Debt 1	_____	_____	_____	_____
Debt 2	_____	_____	_____	_____
Debt 3	_____	_____	_____	_____
			Total \$	_____

Total Debts and Liabilities \$ _____

ESTIMATED ANNUAL RECEIPTS AND INCOME

Wages	_____
Social Security	_____
Interest/Dividends	_____
Pensions/Retirement Distributions	_____
Annuity	_____
Tax Refunds	_____
Alimony	_____
Trust Distributions	_____
Proceeds from Sale of Assets	_____
Rental Income	_____
Gifts	_____
Disability, Unemployment, or Worker's Compensation	_____
Other Public Assistance	_____
Other Receipts/Income (please describe)	_____

Total Estimated Annual Receipts and Income \$ _____

ESTIMATED ANNUAL EXPENSES

Legal and Professional Fees	_____
Income Taxes	_____
FICA and Medicare Taxes	_____
Health Insurance	_____
Other Insurance	_____
Care Facility/Rent/Mortgage	_____
Property Taxes	_____
Home Repair and Maintenance	_____
Utilities	_____
Food and Household Supplies	_____
Clothing	_____
Health Care	_____
Personal Care	_____
Child Care	_____
Auto Expenses	_____
Education	_____
Entertainment, Vacation, Travel	_____
Gifts	_____

Total Estimated Annual Expenses \$ _____

AFFIRMATION

Under penalties of perjury, the undersigned conservator(s) declare(s) that I (we) have read and examined this inventory and that the facts and figures set forth in the summary and attached schedules are true, to the best of my (our) knowledge and belief, and that it is believed to be complete and accurate as far as information permits.

Signed on _____, _____.

By: _____
Conservator's Name

By: _____
Attorney's Name and Bar No.
Address
Phone
Email