

**In the Circuit Court of Davidson County, Tennessee
(Probate Division)**

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	
\$	< 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: _____

JOSEPH P. DAY, Clerk

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]