

**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.				\$
<b>TOTAL REAL PROPERTY &gt;</b>				<b>\$</b>

# 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: \_\_\_\_\_

RICHARD R. ROOKER, 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: \_\_\_\_\_

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