

**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	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 unincorporated 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 OR 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: \_\_\_\_\_  
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NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

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