

IN THE _____ JUDICIAL DISTRICT
DISTRICT COURT OF _____ COUNTY, KANSAS

IN THE MATTER OF THE CONSERVATORSHIP OF:

CASE NO. _____
K.S.A. Chapter 59

Individual Subject to Conservatorship

CONSERVATORSHIP INVENTORY

The full limited conservator states that the following is a true and correct inventory of the income, assets and debts of the Individual Subject to Conservatorship (Individual) as of the date of the Order Appointing the Conservator.

1. Assets

➤ **Real Estate** (including the address and its estimated market value):

| Address | Jointly Owned? (If so, list co-owner) | Estimated Market Value |
|---------|--|------------------------------|
| | | |
| | | |

and see attached additional pages.

➤ **Financial Accounts** - include the name of the financial institution, type of account, ***the last four digits of the account number(s)*** and balance in each account (*for example, savings, checking, money markets, certificate of deposit, retirement accounts, and all investment accounts*):

| | Name of Financial Institution | Account Type | Account # (last 4 digits only) | Jointly Owned? (If so, list co-owner) | Balance | As of Date |
|------------------|-------------------------------|--------------|--------------------------------|--|---------|------------|
| Account 1 | | | | | | |
| Account 2 | | | | | | |
| Account 3 | | | | | | |

and see attached additional pages.

➤ **Stocks, Bonds, and other Securities** (*not held in an account listed above*):

| | Name of Financial Institution | Account Type | Account # (last 4 digits only) | Jointly Owned? (If so, list co-owner) | Balance | As of Date |
|------------------|-------------------------------|--------------|--------------------------------|--|---------|------------|
| Account 1 | | | | | | |
| Account 2 | | | | | | |
| Account 3 | | | | | | |

and see attached additional pages.

➤ **Accounts Receivable** - include the name of the financial institution, type of account, ***the last four digits of the account number(s)***, and balance in each account. Include any Trust from which the person subject to the Conservatorship receives benefits.

| | Name of Financial Institution | Account Type | Account # (last 4 digits only) | Jointly Owned? (If so, list co-owner) | Balance | As of Date |
|------------------|-------------------------------|--------------|--------------------------------|---------------------------------------|---------|------------|
| Account 1 | | | | | | |
| Account 2 | | | | | | |

and see attached additional pages.

➤ **Vehicles** - List all automobiles, motorcycles, motor homes, boats, etc.

Vehicle 1:

Year, Make, Model:

Current Value: _____ Loan Balance: _____

Name of Co-Owner (if applicable): _____

Net Value (Value minus Loans): _____ Estate's Interest* (% owned): _____

Value of Estate's Interest: _____

Vehicle 2:

Year, Make, Model:

Current Value: _____ Loan Balance: _____

Name of Co-Owner (if applicable): _____

Net Value (Value minus Loans): _____ Estate's Interest* (% owned): _____

Value of Estate's Interest: _____

Vehicle 3:

Year, Make, Model:

Current Value: _____ Loan Balance: _____

Name of Co-Owner (if applicable): _____

Net Value (Value minus Loans): _____ Estate's Interest* (% owned): _____

Value of Estate's Interest: _____

and see attached additional pages.

➤ **Personal Property:** (*attach itemized list of all items valued at \$1,000 or more*).

List valuable household goods, artwork, jewelry, safe deposit box contents, storage unit contents, antiques, collectibles, electronics, etc.

Item 1:

Description: _____

Current Value: _____ Loan Balance: _____

Name of Co-Owner (if applicable): _____

Net Value (Value minus Loans): _____ Estate's Interest* (% owned): _____

Value of Estate's Interest: _____

Item 2:

Description: _____

Current Value: _____ Loan Balance: _____

Name of Co-Owner (if applicable): _____

Net Value (Value minus Loans): _____ Estate's Interest* (% owned): _____

Value of Estate's Interest: _____

Item 3:

Description: _____

Current Value: _____ Loan Balance: _____

Name of Co-Owner (if applicable): _____

Net Value (Value minus Loans): _____ Estate's Interest* (% owned): _____

Value of Estate's Interest: _____

Item 4:

Description: _____

Current Value: _____ Loan Balance: _____

Name of Co-Owner (if applicable): _____

Net Value (Value minus Loans): _____ Estate's Interest* (% owned): _____

Value of Estate's Interest: _____

and see attached additional pages.

Total Assets (including attachments) \$ _____

2. Income

| Description | Per Month |
|------------------------|-----------|
| Wages | \$ |
| Social Security or SSI | \$ |
| Veterans Benefits | \$ |
| Pension | \$ |
| Dividends and Interest | \$ |
| Other: | \$ |

and see attached additional pages.

Total Income (including attachments) \$ _____

3. Liabilities/Debts

➤ **Mortgages and Liens** - Name of each mortgage or lien holder and the amount owing, the property encumbered and the amount due monthly:

| | Name of Mortgage or Lien Holder | Amount Owing | Property Encumbered | Amount Due Monthly |
|------------------|---------------------------------|--------------|---------------------|--------------------|
| Account 1 | | | | |
| Account 2 | | | | |

and see attached additional pages.

➤ **Installment Loans and Notes** - Name of each loan holder, the amount owing, and the amount due monthly:

| | Name of Loan Holder | Amount Owing | Amount Due Monthly |
|------------------|---------------------|--------------|--------------------|
| Account 1 | | | |
| Account 2 | | | |

and see attached additional pages.

➤ **Credit Cards** - Name of each credit card company, the outstanding balance owing on each card, and the amount due monthly:

| | Name of Credit Card Company | Outstanding Balance Owing | Amount Due Monthly |
|------------------|-----------------------------|---------------------------|--------------------|
| Account 1 | | | |
| Account 2 | | | |

and see attached additional pages.

Total Liabilities/Debts (including attachments) \$ _____

4. Security for Estate's Assets

Conservator/Trustee's Bond:

The court does not require a bond.
 The court requires a bond in the amount of \$_____
 The bond should remain the same OR be changed to: \$_____

Total balance in blocked accounts: \$ _____

Total balance unblocked: \$ _____

5. **Other Information (If any)**

VERIFICATION OF CONSERVATOR

I state that I am the Conservator of the Estate of the above-named Person Subject to Conservatorship, have read the foregoing Inventory, know the contents thereof, and it is true to my own knowledge and as for those matters, I believe them to be true.

I declare under penalty of perjury under the laws of the State of Kansas that the foregoing is true and correct.

DATED this *(day)* _____ day of *(month)* _____, 20____.

CONSERVATOR'S SIGNATURE

CERTIFICATE OF SERVICE

BY MAIL: I deposited copies of the Inventory in the U.S. mail in (write the name of the city you mailed from) _____, Kansas, addressed to the persons listed below on (date you mailed) _____.

Individual Subject to Conservatorship:

Name: _____

Address: _____

Attorney for Individual Subject to Conservatorship:

Name: _____

Address: _____

Guardian Ad Litem for Individual Subject to Conservatorship

Name: _____

Address: _____

ELECTRONIC: I served the following persons pursuant to the court's electronic service rules on (date) _____:

Individual Subject to Conservatorship:

Name: _____

Email Address: _____

Attorney for Individual Subject to Conservatorship:

Name: _____

Email Address: _____

Guardian Ad Litem for Individual Subject to Conservatorship:

Name: _____

Email Address: _____