
Full Name of Party Filing Document

Mailing Address (Street or Post Office Box)

City, State and Zip Code

Telephone

IN THE DISTRICT COURT FOR THE _____ JUDICIAL DISTRICT
FOR THE STATE OF IDAHO, IN AND FOR THE COUNTY OF _____

IN THE MATTER OF THE ESTATE OF

an Adult.

a Minor.

Case No. _____

CONSERVATOR'S INVENTORY

Fee Category: G7

Fee: \$ _____

Instructions.

The purpose of this report is to give the court as complete a picture as possible of the financial situation for the person under conservatorship as of the date the conservator was appointed.

1. This report, called an inventory, is due within 90 days after appointment as conservator
2. As conservator you will also be required to file accountings:
 - a. The first accounting is due within 30 days after the anniversary date of your appointment, covering the first 12 months of your appointment.
 - b. An accounting is due every year within 30 days after the anniversary.
 - c. A final accounting is due within 30 days after your resignation, removal or termination of the appointment.
3. Please type or print clearly using black ink.
4. After completing this report, you must sign it under penalty of perjury.
5. File with the clerk of the court, provide copies to individuals as ordered by the court, and keep a copy for your records.
6. Complete all sections of this report.

Reporting Period – Explanation.

The information you fill out below will reflect the value of the estate of the person under conservatorship on the date you were appointed.

What date were you appointed conservator? _____

SECTION I - Information About The Person Under Conservatorship.

1. Person under conservatorship's name: _____

2. Person under conservatorship's physical address: _____

3. Person under conservatorship's telephone number(s):

Residence: _____

Cell: _____ Work: _____

Fax: _____ Email: _____

4. Has a guardian also been appointed for the person under conservatorship?

Yes

No

5. Name of guardian _____

Address _____

Phone number of guardian _____

SECTION II – Assets.

Please provide information on all the assets of the person under conservatorship. Assets are anything of value owned by the person under conservatorship. Do not include assets owned by you.

1. Cash on hand (not in a financial institution and not in the person under conservatorship's possession).

Yes

No

Amount \$ _____

If answer is yes, why is cash kept on hand? _____

2. Bank Accounts. (Attach verification of amounts listed.)

| Name Of Bank/Institution | Type Of Account (Examples: checking, savings, certificates of deposit, etc.) | Value On Date Of Appointment |
|--------------------------|---|------------------------------|
| | | \$ |
| | | \$ |
| | | \$ |
| TOTAL | | \$ |

3. Investment Accounts. (Attach verification of amounts listed.)

| Name Of Bank/Institution | Type Of Account (Examples: money market accounts, stocks, bonds, IRAs, 401(k) plan, etc.) | Value On Date Of Appointment |
|--------------------------|--|------------------------------|
| | | \$ |
| | | \$ |
| | | |
| TOTAL | | \$ |

4. Life Insurance Policies. (Attach verification of amounts listed.)

| Name Of Bank/Institution | Type Of Insurance (Examples: whole, term or universal, etc.) | Cash Value On Date Of Appointment |
|--------------------------|---|-----------------------------------|
| | | \$ |
| | | \$ |
| | | \$ |
| TOTAL | | \$ |

5. Real Estate. (Attach verification of amounts listed.)

| Address Of Property (List all land and buildings) | Method For Determining Value (Examples: appraisal, tax assessment, market value, etc.) | Value |
|--|---|-------|
| | | \$ |
| | | \$ |
| | | \$ |
| TOTAL | | \$ |

6. Vehicles.

| Make, Model, And Year (List all cars, boats, snow machines, etc.) | Value | |
|--|-------|----|
| | \$ | |
| | \$ | |
| | \$ | |
| TOTAL | | \$ |

7. Other Property Not Listed Above. (Attach additional pages if necessary.)

| Detailed Description Of Item Or Collection (Only list items or collections that are worth more than \$1,000.00) | Method For Determining Value (Examples: appraisal, market value, etc.) | Value |
|--|---|-------|
| | | \$ |
| | | \$ |
| | | \$ |
| TOTAL | | \$ |

8. Total value of assets listed above. (The Sum Of All "Totals" Reported In Section II.)

SUM TOTAL

| | |
|----|--|
| \$ | |
|----|--|

Section III – Debts.

1. Real Estate Debts. (Attach verification of amounts listed.)

| Address Of Property | Amount Owed On Date Of Appointment |
|---------------------|------------------------------------|
| | \$ |
| | \$ |
| | \$ |
| TOTAL | \$ |

2. Other Loans. (Attach verification of amounts listed.)

| Lender Name | Purpose Of Loan (Examples: automobile loan or personal payday loan, etc.) | Amount Owed On Date Of Appointment |
|-------------|--|------------------------------------|
| | | \$ |
| | | \$ |
| | | \$ |
| TOTAL | | \$ |

3. Credit Cards. (Attach verification of amounts listed.)

| Company Name And Address | Amount Owed On Date Of Appointment |
|--------------------------|------------------------------------|
| | \$ |
| | \$ |
| | \$ |
| TOTAL | \$ |

4. Judgments/Liens. (Attach verification of amounts listed.)

| Judgment/Lien Description | Amount Owed On Date Of Appointment |
|---------------------------|------------------------------------|
| | \$ |
| | \$ |
| | \$ |
| TOTAL | \$ |

5. Other Liabilities/Debts. (Attach verification of amounts listed.)

| Description | Amount Owed On Date Of Appointment |
|-------------|------------------------------------|
| | \$ |
| | \$ |
| | \$ |
| TOTAL | \$ |

6. Total amount owed by person under conservatorship. (The sum of all "TOTALS" reported in Section III.)

SUM TOTAL \$

7. Explain any relationship between the conservator and any creditor listed in any section above: _____

8. Explain any relationship between the person under conservatorship and any creditor listed in any section above: _____

SECTION IV - Net Asset Summary.

| Net Asset Value | Total Amount |
|--|--------------|
| 1. Total Assets (reported from Section II) | \$ |
| 2. Total Debts (reported from Section III) | \$ |
| Net Asset Value (Subtract total assets from total debts) | \$ |

SECTION V - Information About The Conservator.

Please provide any additional information you think is important: _____

Certification – Must Complete

I certify (or declare) under penalty of perjury pursuant to the law of the State of Idaho that the foregoing is true and correct.

The undersigned, _____, conservator of _____, the person under conservatorship, submits this inventory as required by Idaho law.

Date Submitted: _____

Conservator's Signature

Typed/Printed Name

Street or Post Office Address

City, State and Zip Code

Telephone Number(s)

Fax Number

Email

Is this a change in address from your previous report? Yes No

CERTIFICATE OF SERVICE

I certify that on (date) _____ I served a copy to: (name all parties in the case other than yourself)

Person under conservatorship

By mail

By fax (number) _____

By personal delivery

Overnight delivery/Fed Ex

Person under conservatorship's attorney and/or guardian ad litem (if currently representing protected person):

By mail

By fax (number) _____

By personal delivery

Overnight delivery/Fed Ex

Parent or guardian with whom person under conservatorship resides (if any):

By mail

By fax (number) _____

By personal delivery

Overnight delivery/Fed Ex

the following person(s) designated by court order:

By mail

By fax (number) _____

By personal delivery

Overnight delivery/Fed Ex

other:

By mail

By fax (number) _____

By personal delivery

Overnight delivery/Fed Ex

Typed/printed name

Conservator's Signature