

## **CONSERVATOR INVENTORY AND VALUATION**

### **Instructions for Completing**

#### **Definition**

A detailed list or inventory of the conservatee's estate (property and financial resources) at the time of appointment of a conservator.

#### **Filing Procedures**

The inventory is filed with the court within 30 days of the appointment date.

#### **Preparing Documents for the Court**

This document is a permanent legal record. The information should be typed or written legibly. Use black or dark blue ink when reports are handwritten.

**Supplementary Inventory and Valuation** may be filed to change or add information.

### **ASSESSING VALUES**

#### **Jointly Owned Property**

For both real and personal property, indicate if the property is jointly owned and give the name of the co-owner(s) and the form of ownership. Report the full value of the property, not just the portion owned by the conservatee.

#### **Real Estate**

Provide an address and description and the appraised value of the property. The property description is available from the local Register of Deeds office. The appraised value is available from the County Treasurer or Appraiser's office.

#### **Furniture / Household Goods / Wearing Apparel / Jewelry**

Furniture, household goods, and wearing apparel may be listed as a combined value. However, individually valuable items such as antiques, jewelry, coins, electronics, etc. should be listed separately. For assistance with appraisals on items of value, contact a credible antique dealer or auctioneer.

#### **Insurance**

Provide the cash value of all insurance policies.

Add additional lines or pages as needed to provide complete documentation.

IN THE 29<sup>th</sup> JUDICIAL DISTRICT  
DISTRICT COURT OF WYANDOTTE COUNTY, KANSAS

In the Matter of the  
(Guardianship)(Conservatorship of

\_\_\_\_\_

Case No. \_\_\_\_\_

Proceeding Pursuant to K.S.A. Chapter 59

**INVENTORY AND VALUATION**

**REAL ESTATE**

*(Indicate if property is jointly owned and with whom)*

<i>Address and Description</i>	<i>Value</i>
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
Total Real Estate . . . . .	\$ _____

**PERSONAL PROPERTY**

*(Indicate if property is jointly owned and with whom)*

**Cash / Checking and Savings Accounts / Certificates of Deposit**

<i>Description</i>	<i>Amount</i>
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____

**Stocks / Bonds / Investments / Retirement Accounts / Annuities**

<i>Description</i>	<i>Value</i>
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____

**Vehicles / RVs / Boats / Trailers**

<i>Description</i>	<i>Value</i>
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____

**Furniture / Household Goods / Wearing Apparel / Jewelry**

<i>Description</i>	<i>Value</i>
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____

**Other Assets**

(For example: interest in a business entity; oil & gas lease or interest; agricultural lease interest and accounts in cooperatives; livestock; equipment; debts owed to the conservatee; interest in a trust; life insurance; long term care insurance; funeral or burial plan; burial plot)

<i>Description</i>	<i>Value</i>
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____

Total Personal Property . . . . . \$ \_\_\_\_\_

**DEBTS AND LIABILITIES**

**Mortgages / Liens / Loans / Credit Card Debt**

<i>Description</i>	<i>Amount</i>
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____

Total Debts and Liabilities . . . . . \$ \_\_\_\_\_

**RECAPITULATION**

Total Real Estate..... \$ \_\_\_\_\_  
Total Personal Property ..... \$ \_\_\_\_\_  
Less Total Debts and Liabilities ..... \$ ( \_\_\_\_\_ )  
Total Estate \$ \_\_\_\_\_

**SOURCES OF REGULAR INCOME**

(For example: social security benefits, supplemental security income; pension or retirement income; trust or annuity payments; veteran’s benefits; farm or rental income; oil and gas income; child support or alimony; interest)

	<i>Description</i>	<i>Amount</i>	<i>How Often Received</i>
1.	_____	\$ _____	per _____
2.	_____	\$ _____	per _____
3.	_____	\$ _____	per _____
4.	_____	\$ _____	per _____

I declare under penalty of perjury under the laws of the state of Kansas that the foregoing is true and correct. Executed on \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Conservator