

**PROBATE COURT OF WHITFIELD COUNTY
STATE OF GEORGIA**

Inventory and Asset Management Plan for Minor/Ward, Short Form

IN RE:	:	ESTATE NO: _____
_____	:	Age: _____
Ward/Minor	:	Date of Birth: _____
_____	:	Social Security #: _____
Conservator(s)	:	

1. INVENTORY

A. PERSONAL AND INTANGIBLE PROPERTY

Approximate Current Value

Checking/Savings/Money Market/Certificates of Deposit/Liquid Accounts:	\$ _____
Stocks/Bonds/Investments (including retirement and profit-sharing accounts):	\$ _____
Automobiles: (Year/Make/Model) (V.I.N.) (Joint owner (if any))	\$ _____
Other assets of significant value:	\$ _____
TOTAL VALUE OF PERSONAL PROPERTY	\$ _____

B. REAL PROPERTY (Indicate if property is jointly owned and with whom)

Description	County	State	Approximate equity
_____			\$ _____
_____			\$ _____
<u>INCOME FROM ALL SOURCES</u>			Yearly Total
Social Security per year			\$ _____
SSI (Supplemental Security Income) per year			\$ _____
Retirement or VA benefits per year			\$ _____
Child Support			\$ _____
Other income, including, e.g., interest, alimony, annuity, or trust distributions			\$ _____
YEARLY TOTAL OF ALL INCOME			\$ _____

2. BUDGET

I/We plan during the following reporting year to (initial one)

- _____ a. to disburse neither principal or interest from the minor's/ward's estate
- _____ b. to disburse the interest earned on the minor's/ward's estate for the following: _____
- _____ c. regardless of interest earned, to disburse from the minor's/ward's estate the sum of \$ _____ per month for the following purposes:

- _____ d. regardless of interest earned, to disburse from the minor's/ward's estate the sum of \$ _____ for the one-time expense for the following:

3. TRUST (initial one)

- _____ a. Minor/Ward is not a beneficiary of a Trust
- _____ b. Minor/Ward is a beneficiary of a Trust, the following is the Trust and Trustee's information: _____

4. ASSET MANAGEMENT PLAN

I/We plan to (initial one)

- _____ a. maintain the investment plan for the minor's /ward's assets as indicated above with no changes.
- _____ b. reinvest the minor's /ward's funds as follows: _____

AFFIDAVIT

I/We _____ ,

Conservator(s) of the above minor/ward, do swear that the foregoing Inventory and Asset Management Plan contains a just, true, and complete inventory and budget of all property belonging to said ward within my/our possession, control, or knowledge. This Inventory and Asset Management Plan has been provided to the Guardian of the Ward, if any, by first class mail.

Signature of Conservator

Signature of Co-Conservator, if any

Printed Name

Printed Name

Address

Address

Telephone Number

Telephone Number

VERIFICATION

Sworn to and subscribed before
me this ____ day of _____, 20____.

Conservator

NOTARY/CLERK OF PROBATE COURT
My Commission Expires _____

Printed Name of Conservator

Sworn to and subscribed before
me this ____ day of _____, 20____.

Co-Conservator, if any

NOTARY/CLERK OF PROBATE COURT
My Commission Expires _____

Printed Name of Conservator