

**DISTRICT COURT OF SHAWNEE COUNTY, KANSAS
THIRD JUDICIAL DISTRICT**

**INITIAL CONSERVATOR INVENTORY AND VALUATION
Instructions for Completing**

The Initial Inventory and Valuation is filed by the Conservator upon appointment by the Court. The Initial Inventory is a detailed list or inventory of the conservatee's estate. It includes property and financial resources at the time the Conservator is appointed.

Filing Procedures - The Inventory is filed with the Clerk of the Court within 30 days after the appointment of the Conservator.

Permanent Legal Record - 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. You may supplement the Inventory and Valuation if additional assets are discovered. This is called an Amended Inventory and Valuation.

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, description, and the appraised value of the property. The property description is available from the Shawnee County Register of Deeds' office, <https://www.snco.us/rd/>. The appraised value is available from the Shawnee County Appraiser's office: <https://www.snco.us/ap/>.

Furniture / Antiques / Collections / Household Goods / Jewelry, etc. – Please itemize valuable items such as antiques, jewelry, coins, electronics, etc. The value of other items may be combined. For assistance with appraisals on items of value, contact a credible antique dealer or auctioneer.

Insurance - Provide the cash value of all insurance policies. Burial plans must be included.

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

IN THE THIRD JUDICIAL DISTRICT COURT OF SHAWNEE COUNTY, KANSAS
 Filed Pursuant to K.S.A. Chapter 59

In the Matter of the)
 Conservatorship of)
 _____)
 _____)

CASE NO. _____

INITIAL INVENTORY AND VALUATION
 (Use additional paper as needed.)

UPON MY APPOINTMENT as Conservator in the above-entitled matter, I hereby submit the following Initial Inventory and Valuation in the conservatorship of:

Conservatee's Name Street Address

 City State Zip Code

 Telephone Number Email Address

Conservator/Trustee's Name Street Address

 City State Zip Code

 Telephone Number Email Address

INITIAL INVENTORY AND VALUATION

1. REAL ESTATE (Address and Description / Note if jointly owned and with whom.)

	VALUE
(a) _____	\$ _____
(b) _____	\$ _____
TOTAL REAL ESTATE	\$ _____

2. PERSONAL PROPERTY (Address and Description/ Note if jointly owned.)

(a) Financial Institution Accounts

 ✓ Cash / Checking Account (Bank, Credit Union, etc.)

_____ \$ _____

_____ \$ _____

 ✓ Savings Account/ Location (Bank, Credit Union, etc.)

_____ \$ _____

_____ \$ _____

Certificate of Deposit/Location (Bank, Credit Union, etc.)
 _____ \$ _____
 _____ \$ _____
 Cash Value of Insurance Policies _____ \$ _____
 _____ \$ _____
 Other _____ \$ _____
 _____ \$ _____

(b) Investments - Stocks, Bonds, Investments, Retirement Accounts, Annuities
 _____ \$ _____
 Describe
 _____ \$ _____
 Describe
 _____ \$ _____
 Describe

(c) Vehicles, RVs, Boats, Trailers, etc.
 _____ \$ _____
 Describe
 _____ \$ _____
 Describe
 _____ \$ _____
 Describe
 _____ \$ _____
 Describe

(d) Furniture, Antiques, Collections, Household Goods, Jewelry, etc.
 _____ \$ _____
 Describe
 _____ \$ _____
 Describe
 _____ \$ _____
 Describe
 _____ \$ _____
 Describe

(e) Other Assets Not Listed Above (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.)
 _____ \$ _____
 Describe

_____	\$ _____
Describe	
_____	\$ _____
Describe	
_____	\$ _____
Describe	
_____	\$ _____
Describe	
_____	\$ _____
Describe	

TOTAL PERSONAL PROPERTY..... \$ _____

TOTAL ASSETS (Add Total Real Estate and Personal Property) \$ _____

DEBTS AND LIABILITIES

Mortgages / Liens / Loans / Credit Card Debt

1. _____	\$ _____
Describe	
2. _____	\$ _____
Describe	
3. _____	\$ _____
Describe	
4. _____	\$ _____
Describe	
5. _____	\$ _____
Describe	
6. _____	\$ _____
Describe	

TOTAL DEBTS AND LIABILITIES \$ _____

RECAPITULATION

Total Assets \$ _____

Less Total Debts and Liabilities \$ (_____)

Total Estate Value \$ _____

SOURCES OF REGULAR INCOME

List, for example, social security benefits; supplemental security income; disability income; pension or retirement income; trust or annuity payments; veteran's benefits; farm or rental income; and child support or alimony/maintenance income; interest income.

- | | | |
|----|----------|----------|
| 1. | _____ | \$ _____ |
| | Describe | |
| 2. | _____ | \$ _____ |
| | Describe | |
| 3. | _____ | \$ _____ |
| | Describe | |
| 4. | _____ | \$ _____ |
| | Describe | |
| 5. | _____ | \$ _____ |
| | Describe | |

I DECLARE, UNDER PENALTY OF PERJURY, UNDER THE LAWS OF THE STATE OF KANSAS, THAT THE FOREGOING ACCOUNTING IS TRUE AND CORRECT.

Date

Conservator's Signature