

IN THE CIRCUIT COURT, SEVENTH  
JUDICIAL CIRCUIT, IN AND FOR  
ST. JOHNS COUNTY, FLORIDA

CASE NO.: \_\_\_\_\_

DIVISION: \_\_\_\_\_

Amended Form?  Yes\*  No

\*If yes, version of the Amended Form:

In Re: Guardianship of

\_\_\_\_\_

INITIAL INVENTORY

Date of letters of guardianship: \_\_\_\_\_

Property guardianship type: \_\_\_\_\_

SUMMARY

Section A: Value of Real Property Assets \$ \_\_\_\_\_

Section B: Cash Assets/Cash Equivalent Assets \$ \_\_\_\_\_

Section C: Intangible Assets/Stocks/Bonds \$ \_\_\_\_\_

Section D: Tangible Personal Property \$ \_\_\_\_\_

Section E: Debts/Encumbrances/Liabilities/Liens \$ \_\_\_\_\_

**Total** \$ \_\_\_\_\_

**Section A: Real Property Assets**

Do you have entries for Section A?  Yes  No

<u>Number</u>	<u>Description and Address</u>	<u>Full Value</u>	<u>Is There Another Owner? Yes or No</u>
<u>1.</u>			
<u>2.</u>			
<u>3.</u>			

**Total for Section A** \$ \_\_\_\_\_

Attach a copy of the property appraiser's information or a copy of the deed for all real property.

**Section B: Cash Assets/Cash Equivalent Assets (checking account, savings account, money market account, certificate of deposit (CD))**

Do you have entries for Section B?  Yes  No

Are any of the entries held in a depository account?  Yes  No

<u>Number</u>	<u>Institution Name</u>	<u>Last 4 Digits of Account Number</u>	<u>Type of Asset</u>	<u>Full Value</u>	<u>Is There Another Owner? Yes or No</u>	<u>Is this a Depository Account? Yes or No</u>
<u>1.</u>						
<u>2.</u>						
<u>3.</u>						

**Total for Section B** \$ \_\_\_\_\_

Attach a copy of the institution's statement for each account from the creation date of the guardianship.

**Section C: Intangible Assets/Stocks/Bonds**

Do you have entries for Section C?  Yes  No

Are any of the entries held in a depository account?  Yes  No

<u>Number</u>	<u>Issuer Name and Address</u>	<u>Type of Asset</u>	<u>Full Value</u>	<u>Last 4 Digits of Account Number</u>	<u>Is There Another Owner? Yes or No</u>
<u>1.</u>					
<u>2.</u>					
<u>3.</u>					

**Total for Section C** \$ \_\_\_\_\_

Attach a copy of the institution's statement for each account from the creation date of the guardianship.

**Section D: Tangible Personal Property Assets (motor vehicles, jewelry, household furnishings, collectibles, fine art)**

Do you have entries for Section D?  Yes  No

<u>Number</u>	<u>Description and Location</u>	<u>Full Value</u>	<u>Is There Another Owner? Yes or No</u>
<u>1.</u>			
<u>2.</u>			
<u>3.</u>			

**Total for Section D** \$ \_\_\_\_\_

Attach a copy of the title for any motor vehicle.

**Section E: Debts/Encumbrances/Liens/Liabilities**

Do you have entries for Section E?  Yes  No

Instructions: List each liability equal to or greater than \$1,000.

<u>Number</u>	<u>Creditor</u>	<u>Full Amount of Liability</u>	<u>Last 4 Digits of Account Number</u>	<u>Is there Another Person who Owes on the Debt? Yes or No</u>
<u>1.</u>				
<u>2.</u>				
<u>3.</u>				

**Total for Section E** \$ \_\_\_\_\_

A copy of documents detailing each listed liability.

**Section F: Sources of Income**

Do you have entries for Section F?  Yes  No

<u>Number</u>	<u>Type</u>	<u>Payor</u>	<u>Estimated Monthly Amount</u>
<u>1.</u>			
<u>2.</u>			
<u>3.</u>			

**Total for Section F** \$ \_\_\_\_\_

Is the guardian the representative payee of Social Security benefits?  Yes  No

If no, who is the representative payee for the Social Security benefits?

**Section G: Lawsuits Against the Ward**

Do you have entries for Section G?  Yes  No

<u>Number</u>	<u>Description of Lawsuit or Claim</u>	<u>Estimated Amount of Claim</u>	<u>Court Address</u>	<u>Plaintiff's Name and Address</u>	<u>Describe Cause of Action</u>	<u>Date of Debt Occurrence</u>
<u>1.</u>						
<u>2.</u>						
<u>3.</u>						

**Section H: Pending Litigation and/or Lawsuits the Ward May Bring if Court Approval Is Received**

Do you have entries for Section H?  Yes  No

<u>Number</u>	<u>Description of Lawsuit or Claims</u>	<u>Case Number and Court Address</u>	<u>Defendant Name and Address</u>	<u>Describe Cause of Action</u>	<u>Attorney for Ward</u>
<u>1.</u>					
<u>2.</u>					
<u>3.</u>					

**Section I: Assets the Ward, as of the Date of the Letters of Guardianship, Was Entitled to Receive, but Has Not Received**

Do you have entries for Section I?  Yes  No

Instructions: If the guardian has knowledge of assets the ward was entitled to receive as of the date of letters, but were not received the assets should be listed here. Examples: insurance policies, benefits, inheritance, or settlements from litigation.

<u>Number</u>	<u>Description</u>	<u>Estimated Date of Receipt</u>	<u>Estimated Amount</u>
<u>1.</u>			
<u>2.</u>			
<u>3.</u>			

**Section J: Trusts**

Do you have entries for Section J?  Yes  No

<u>Number</u>	<u>Name of Current Trustee and Address</u>	<u>Ward's Interest</u>	<u>Estimated Date Trust was Created</u>	<u>Value of the Ward's Interest in the Trust</u>
<u>1.</u>				
<u>2.</u>				
<u>3.</u>				

**Section K: Safe-Deposit Box**

Does the ward lease a safe-deposit box?  Yes  No

If yes, location and number of safe-deposit box: \_\_\_\_\_

Does the ward lease a safe-deposit box with another individual or individuals?  Yes  No

Who is the joint lessee with the ward? \_\_\_\_\_

Was an inventory of the safe-deposit box filed with the court as required by section 744.365, Florida Statutes?  Yes  No

Has the safe-deposit box been opened?  Yes  No

*[A certificate of service as required by Florida Rule of Judicial Administration 2.516 must be included if the incapacitated person is not a minor under 14 years of age and is not totally incapacitated.]*

I certify that the foregoing document has been furnished to \_\_\_\_\_  
by  e-portal,  email,  delivery, or  mail on \_\_\_\_\_.

\_\_\_\_\_  
Guardian's Signature  
Printed Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_