

**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