

IN THE CIRCUIT COURT OF JACKSON COUNTY, MISSOURI – PROBATE DIVISION

AT KANSAS CITY
 INDEPENDENCE

IN THE ESTATE OF _____,

ESTATE NUMBER _____

Deceased. Protectee. Minor.

INVENTORY OF PROPERTY

The undersigned fiduciary of the above captioned estate avers that a description of all real and personal property owned by the decedent/protectee, valued as required by law, is attached hereto as Appendix A, and that a recapitulation of said personal property is set forth below.

RECAPITULATION OF PERSONAL PROPERTY (FROM APPENDIX A)

- | | |
|---|----------|
| 1. Furniture, household goods, wearing apparel. | \$ _____ |
| 2. Corporation stocks. | _____ |
| 3. Mortgages, bonds, notes. | _____ |
| 4. Cash \$ _____ Bank, Savings and Loan accounts \$ _____ | _____ |
| Insurance policies \$ _____ | _____ |
| 5. All other personal property (no real estate). | _____ |
| TOTAL <u>PERSONAL</u> PROPERTY | \$ _____ |

AFFIDAVIT OF FIDUCIARY

STATE OF MISSOURI)
) ss
COUNTY OF JACKSON)

The undersigned fiduciary, being first duly sworn, says that Appendix A attached hereto is a full inventory and description of all the real and personal property of said estate which has come to his possession or knowledge, including a statement of all encumbrances, liens, and other charges on any property and that the said fiduciary was not in debt or bound in any contract to the decedent/protectee, except as stated herein.

Subscribed and sworn to before me on _____
Commission expires: _____

ATTORNEY FOR ESTATE: _____ MO BAR No. _____
ADDRESS AND ZIP CODE _____

TELEPHONE (_____) _____ FAX NO. (_____) _____
E-MAIL ADDRESS _____

APPENDIX A
REAL PROPERTY

Tract No.	Legal Description	Value

APPENDIX A
REAL PROPERTY

Tract No.	Legal Description	Value

APPENDIX A
PERSONAL PROPERTY

Item No.	Description	Value

APPENDIX A
PERSONAL PROPERTY

Item No.	Description	Value

****DO NOT FILE THIS PAGE WITH THE COURT****

INSTRUCTIONS REGARDING INVENTORY OF PROPERTY

The Inventory of Property form is to be completed in accordance with the applicable Section 14, 15 or 31 of the Jackson County, Missouri – Probate Division’s Probate Procedures Manual ("PPM"). The link to these sections is [PROBATE PROCEDURES MANUAL](#).

- Page 1 of the Inventory of Property form must be printed out, signed by fiduciary with signature notarized, scanned into your computer and then filed with the court;
- The Appendix A (Real and Personal Property) must be filled out on your computer. It can then be directly filed with the court as an attachment to the signed and notarized Page 1 of the Inventory of Property or it can be printed out, scanned into your computer with Page 1 of the Inventory of Property and then filed as one document with the court;
- If you do not have a full version of adobe acrobat to complete the form, you may download a free version of Adobe reader 11 in order to save the data. Use of other non-adobe third-party pdf software may result in performance problems completing the form and saving data. To download the free version go to: <http://get.adobe.com/reader/>.

Instructions as to ALL ESTATES:

- The Inventory must contain a reasonably detailed description and value of all property **of the decedent as of the date of the decedent’s death or of the protectee/minor as of the date Letters of Conservatorship were issued to the conservator** and include any encumbrances, liens, or other charges on any real or personal property;
- Real property – provide the full legal description as it appears on the deed wherein decedent/protectee took ownership, fractional interest of ownership if less than 100% and the commonly known street address;
- Stocks & Bonds – state the number of shares, name of company, class of stock; if assets are in a brokerage account, list account number and individually list stocks, bonds and any other holdings in account or attach a copy of the brokerage statement detailing investments;
- Mortgages, Deeds of Trust, Bonds, Notes – include any evidence of debt wherein another individual/entity is indebted to the decedent or protectee/minor – PPM 14.50.4 or 31.50.4;
- Bank accounts – state the name of the financial institution, type of account and account number;
- Insurance – state the name of the insurance company, type of policy, policy number, face value, name of insured;
- Vehicles (land and water, trailers) – state the year, manufacturer, model of the vehicle and the vehicle identification number as applicable;
- Sole Proprietorship or Partnership assets – include ownership percentage in detail of asset; value is based on assets and liabilities;

- Judgments/Lawsuits – state the case number, court jurisdiction, style of case, amount recovered (if determined); a copy of the final Judgment or Settlement Agreement is to be attached to the Inventory.

Instructions as to CONSERVATORSHIP ESTATES:

- Real property - list Missouri and non-Missouri real estate;
- Insurance –include in detail of policy any beneficiary on the policy; value will be cash surrender value as of the date Letters of Conservatorship were issued;
- Property in which protectee/minor has an interest must be listed – PPM 31.30;
- Jointly-held property – provide full description of the property; value will be full value of asset;
- Monthly income – include detail of all monthly income/benefits payable to the protectee/minor. This is For Information Only and is not included in the Inventory totals.

Instructions as to DECEDENT ESTATES:

- Real property – list Missouri real estate only;
- List separately any item specifically bequeathed in Will;
- Life insurance – list the company name, specific name of insured and policy number.