

CONSERVATOR INVENTORY REPORT

PROTECTED PERSON'S NAME: _____

DATE: _____

ASSETS:

Cash (checking, savings, CD, etc)	
	\$
	\$
	\$
	\$

Total Cash

\$ _____

Investments (stocks, bonds etc.)	
	\$
	\$
	\$
	\$

Total Investments

\$ _____

Real Estate	
	\$
	\$
	\$

Total Real Estate

\$ _____

Vehicles	
	\$
	\$
	\$
	\$

Total Vehicles

\$ _____

Insurance Policies (state face value on description line, cash surrender value on \$ line.	
	\$
	\$
	\$

Total Insurance Policies

\$ _____

Personal Property (only individually list items of great values, otherwise, state a grand total)	
	\$
	\$
	\$

Total Personal Property \$ _____

TOTAL ASSETS: \$ _____

LIABILITIES:

Credit Cards	
	\$
	\$
	\$

Total Credit Cards \$ _____

Loans (Mortgages, Vehicles, Personal loans, etc.)	
	\$
	\$
	\$
	\$
	\$

Total Loans \$ _____

Other Liabilities	
	\$
	\$
	\$
	\$
	\$

Total Other Liabilities \$ _____

TOTAL LIABILITIES \$ _____

TOTAL NET WORTH: \$ _____

Note: If any assets of the protected person have been sold during this time period, please complete the Conservatee Report of Assets Sold on the Conservator Income and Expense Report. If additional space is required for descriptions or detailed listings, please attach the information on separate sheets of papers.

