

Easy Inventory Collector



The Easy Inventory Collector[©] helps simplify the process of providing all the necessary information for the probate court. Our goal is to save you time, and reduce uncertainty.

Provide copies of the following documents for the month in which the decedent passed away:

- Stocks or savings bonds certificates held outside the decedent's brokerage account
 - U.S. treasury notes
 - Bank statements from decedent's bank
 - Any general or limited partnership agreements, certificates, or any other related documents
 - All information regarding mutual fund accounts that the decedent may have had
 - Deeds to real property
 - Mortgages, mortgage notes, amortization schedules and any other related information surrounding the mortgage
 - IRS's Keogh plans
 - Pension plans
 - Annuity plans
 - Forms 1040 for the decedent's final two years
 - State tax returns for the decedent's final two years
 - Certificates of title for any vehicles the decedent owned at the time of their death including automobiles, motorcycles and other motorized vehicles
 - Any life insurance policies the decedent may have had
 - Bills owed by the decedent
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- A listing of any, and all personal property owned by the decedent at the time of death, including its estimated value
 - A listing of collectables, including insurance riders
 - Safe deposit box information, including the number(s), location, and inventory present within
 - Contact information including the decedent's accountant, including their name, telephone number, email address and physical address
 - A list of all pending lawsuits, if applicable, including suits regardless of whether the decedent is named as a plaintiff or defendant

Generally the following categories of property will be in a typical estate and included in the inventory:

All real estate in which the decedent had any interest (other than that which passes to another by right of survivorship or estates by the entireties), in fee simple or as a life estate or remainder interest. The following information should be included in regard to each parcel of real estate:

Real property

- Street address, city, state and zip code
- If mortgaged, the mortgagee, amount of the mortgage, rate of interest and the date payments are due
- Legal description and parcel number (can be provided by your real estate professional or title company)
- The amount of land and the decedent's interest

Property address	Parcel number	Mortgage company	Mortgage amount & interest rate	Payment due date

If a rental property:

- - monthly rental amount \$ _____ month to month Yes No (circle one) or date lease expires _____
 - tenant name, phone and email: _____
 - the amount of the mortgage \$ _____ rate of interest ____ % and the date payments are due _____
 - name and contact information of the property management company _____

- Property taxes on all real property, and are tax payments up to date
 - \$ _____ taxes are paid up-to-date Yes or No (circle one)

- Insurance on any real property, the amount, company, policy number, date of expiration

Property address	Insurance company name & number	Policy number	Policy cost	Expiration date
			\$ _____	
			\$ _____	
			\$ _____	
			\$ _____	
			\$ _____	
			\$ _____	
			\$ _____	
			\$ _____	

Personal property:

An inventory will include all property, other than real estate, owned by the decedent at the time of death. This covers a wide variety of items, and the following list may be used as a guide in making the inventory. In each case the value, location and nature of ownership of the property should be indicated.

Automobile, truck, motorcycle, boat, snowmobile, and motorhome:

Make/model/year	Mileage	VIN/serial number	License #	Insurance company	Liens/lender

Household furniture:

Major pieces of furniture can be described in each room with items of great value ie. appliances, or furniture to be listed.

Living room:

Item of value	Approximate value	Additional information

Dining room:

Item of value	Approximate value	Additional information

Family room

Items of value

Approximate value

Additional information

Den/home office

Item of value

Approximate value

Additional information

Kitchen

Item of value

Approximate value

Additional information

Primary bedroom

Item of value

Approximate value

Additional information

Bedroom #2

Item of value

Approximate value

Additional information

Bedroom #3

Item of value

Approximate value

Additional information

Bedroom #4

Item of value

Approximate value

Additional information

Garage

Item of value

Approximate value

Additional information

Personal property

This includes jewelry, clothing, furs, and other valuable personal items.

Item (circle one)	Description	Location	Approximate	Value
jewelry, firearms, furs, other			\$	
jewelry, firearms, furs, other			\$	
jewelry, firearms, furs, other			\$	
jewelry, firearms, furs, other			\$	
jewelry, firearms, furs, other			\$	
jewelry, firearms, furs, other			\$	
jewelry, firearms, furs, other			\$	

Tangible personal property

Items such as paintings, object of art, silver etc. are not considered personal effects and are listed in this separate category.

Item (circle one)	Description	Location	Approximate Value
paintings, object of art, silver, other			\$
paintings, object of art, silver, other			\$
paintings, object of art, silver, other			\$
paintings, object of art, silver, other			\$
paintings, object of art, silver, other			\$

Business inventory

If the decedent owned an interest in a business operated as a proprietorship, a list should be made for any stock in trade, fixtures, tools and equipment of the business, stating the cost, and the date of purchase and inventory value as of the date of death.

Item (circle one)	Description	Location	Approximate Value
stock, fixture, tool, other			\$
stock, fixture, tool, other			\$
stock, fixture, tool, other			\$
stock, fixture, tool, other			\$
stock, fixture, tool, other			\$

Personal insurance

List each insurance policy, such as life, accident and health and hospitalization regardless of whether they are made payable to a named beneficiary or are on the life of another person, listing separately each company, serial number, amount, beneficiary, and when the most recent premium was paid and for what period including any annuities or retirement benefits. Life insurance that is not payable to the estate is not included in the value of the estate.

Company	Serial number	Amount	Beneficiary	Date premium paid	Premium paid time period
_____	_____	\$ _____	_____	_____	_____
_____	_____	\$ _____	_____	_____	_____
_____	_____	\$ _____	_____	_____	_____
_____	_____	\$ _____	_____	_____	_____
_____	_____	\$ _____	_____	_____	_____
_____	_____	\$ _____	_____	_____	_____

Cash assets

List all bank accounts - including check or savings accounts, name and address of bank and the amount of funds. List the exact amount of cash in possession of the decedent or in a safe deposit box. Joint accounts should include the name and address of each joint owner and relationship to the decedent.

Promissory notes – include the exact name of the payee on the note, the name and address of the maker and endorser, the principal amount, interest rate, present balance due, and dates payments are due. List whether the note is secured by a mortgage or other property and describe the mortgage, if any. Any amounts due to the decedent – list all accounts, debts and obligations owing to the decedent such as employment related death benefits and retirement plan benefits.

Bank accounts (circle one)	Bank name and address	Account number	Dollar amount
checking, savings, safe deposit, other	_____	_____	\$ _____
checking, savings, safe deposit, other	_____	_____	\$ _____
checking, savings, safe deposit, other	_____	_____	\$ _____
checking, savings, safe deposit, other	_____	_____	\$ _____
checking, savings, safe deposit, other	_____	_____	\$ _____
checking, savings, safe deposit, other	_____	_____	\$ _____
checking, savings, safe deposit, other	_____	_____	\$ _____

Promissory notes

Name/address of payee on note	Name/address of maker/endorser	Principal amount & interest rate	Present balance & due date	Secured by a mortgage?	
				yes	no
				yes	no
				yes	no

Stocks and bonds, mutual funds, partnership interests, or limited liability company interests

Include the name of the issuing company or association, account number, registered owner, interest rate, principal amount or par value of each bond or share or stock or unit in any other business entity

Issuing company or association	Account number	Registered owner	Interest rate	Principal amount	Other information

Collections

All valuable collections such as stamps, coins, books, etc. should be listed separately.

Type of Collection	Estimate of value
	\$
	\$
	\$
	\$
	\$