

The format of this Inventory is an example and is not required!

GUARDIANSHIP OF  
JOHN SMITH  
INCAPACITATED

)  
,  
)  
,

IN THE PROBATE COURT  
OF  
DENTON COUNTY, TEXAS

The following is a full, true and complete Inventory and Appraisalment of all real property of the Ward and of all personal property of the Ward ("Estate"), together with a List of Claims due and owing to this Estate as of the date of qualification of the Guardian, which have come to the possession or knowledge of the undersigned.

The Ward is [married or single]. All of the property listed below was the Ward's [separate property and/or his/her one-half interest in community property.]

SUMMARY OF INVENTORY AND APPRAISEMENT SCHEDULE

1. Real Property (See Schedule A)		\$325,000.00
2. Stock and Bonds (See Schedule B)		\$107,532.00
3. Cash and Bank Accounts (See Schedule C)		\$0.00
4. Insurance (See Schedule D)		\$0.00
6. Miscellaneous Property (See Schedule E)		\$19,250.00
<b>TOTAL</b>		<b>\$451,782.00</b>

Tip: When you have completed your INA, add it up *one more time* just to be sure it balances!

If a bond is required, please verify that the bond is sufficient to cover the value of all personal property.  
  
The Court will not be able to approve an Inventory if the bond is insufficient.

There are no claims due and owing to the Estate other than those shown on the foregoing Inventory, Appraisalment and List of Claims (see Schedule F).

Total of Claims (Schedule F) \$26,625.00

The foregoing Inventory, Appraisalment and List of Claims should be approved and ordered entered of record.

Respectfully submitted,

\_\_\_\_\_  
Attorney(s) for the Guardian

Address: \_\_\_\_\_

City, State \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

Email \_\_\_\_\_

State Bar No. \_\_\_\_\_

This section is for *claims*. Money claimed to be owed to the Estate. Claims that belong to the estate are not debts owed by the Estate.

JOHN SMITH, PR-2025-12345

THE STATE OF TEXAS

)

)

KNOW ALL MEN BY THESE PRESENTS:

COUNTY OF DENTON

)

That I, \_\_\_\_\_, having been duly sworn, hereby state on Oath that the foregoing Inventory, Appraisement and List of Claims is a true and complete statement of all the property and claims of the Estate of which the Guardian has knowledge.

\_\_\_\_\_  
Guardian

SWORN TO AND SUBSCRIBED BEFORE ME, by \_\_\_\_\_, this the \_\_\_\_\_ day of \_\_\_\_\_, 2018, to certify which witness my hand and seal of office.

**Tip: The Court will not be able to approve an Inventory if the Notice to Creditors has not been filed.**

\_\_\_\_\_  
Notary Public in and for the State of Texas

**SCHEDULE A  
REAL PROPERTY  
JOHN SMITH, PR-2025-12345**

Description of Assets

Separate Property

**Tip: Legal description is required on real property however including the street address is helpful.**

Value

Address: 123 Street, City, State, Zip  
 Legal Description: Name of Addn, Blk A, Lot 1, Old DCAD A12345, TR1A  
 \$150,000.00

Address: 30% undivided interest in 124 Name of Street, Denton,  
 Legal Description: 30% undivided interest in Name of Addn, Blk A, Lot 1, Old DCAD A12345, TR1A, Total Value \$300,000 - Rental Property  
 \$100,000.00

Address: \_\_\_\_\_  
 Legal Description: \_\_\_\_\_

**Total Value of Separate Real Property** \$250,000.00

Community Property

Address: 123 Name of Street, Denton, TX 76201  
 Legal Description: Name of Addn, Blk A, Lot1, Old DCAD A12345, TR1A  
 \$150,000.00

Address: \_\_\_\_\_  
 Legal Description: \_\_\_\_\_

Address: \_\_\_\_\_  
 Legal Description: \_\_\_\_\_

Total \$150,000.00

Less: Spouse's One-Half Community Property Interest 50% \$75,000.00

**Ward's Community Property Interest** \$75,000.00

**Tip: Clearly indicate full value of the asset then reduce by 50% on community property.**

**SCHEDULE B  
STOCKS, BONDS, AND OTHER FINANCIAL INVESTMENTS  
JOHN SMITH, PR-2025-12345**

**This Schedule also includes other investments such as mutual funds, partnerships, etc.**

<u>Description of Assets (include last 4 digits of account #)</u>	<u>Value</u>
<u>Separate Property</u>	
AT&T Common Stock, 400 shs @ \$36.30	\$14,520.00
Personal Loan to John Smith, 222 Street, City, State, Zip dated 04.05.16 in the original amount of \$20,000 at 6% for 20 Years, monthly payments each 15th beginning 05.15.16, Outstanding balance:	\$15,000.00
Total Value of Separate Stocks and Bonds	\$29,520.00
<u>Community Property</u>	
Fidelity Account, 1234 Investaway Blvd, Denton, TX XXXXXX1234	\$156,024.00
Total	\$156,024.00
Less: Spouse's One-Half Community Property Interest                      50%	\$78,012.00
Ward's Community Property Interest	\$78,012.00

**Be sure to include last four digits of the account number along with the name and address of the institution.**

**SCHEDULE C  
CASH AND BANK ACCOUNTS  
JOHN SMITH, PR-2025-12345**

This Schedule  
includes 'cash  
equivalents' such as  
bank accounts.

Description of Assets (include last 4 digits of account number) Value

Separate Property


Name and address of institution along with the last 4 digits of account number

**Total Value of Separate Cash and Bank Accounts** **\$0.00**

Community Property


**Total** **\$0.00**

**Less: Spouse's One-Half Community Property** **\$0.00**

Interest                  50%

**Ward's Community Property Interest** **\$0.00**

**SCHEDULE D  
INSURANCE  
JOHN SMITH, PR-2025-12345**

**Description of Assets (including last 4 digits of policy #)** **Value**

**Separate Property**

Include name and address of insurance company along with the last 4 digits of the policy number.


**Total Value of Separate Insurance:** **\$0.00**

**Community Property**


**Total** **\$0.00**

**Less: Spouse's One-Half Community Property Interest      50%** **\$0.00**

**Ward's Community Property Interest** **\$0.00**

**SCHEDULE E  
MISCELLANEOUS PROPERTY  
JOHN SMITH, PR-2025-123**

**Household Furnishings and Personal Effects will not require itemization if under \$10,000; if decedent's portion is in excess of \$10,000 itemization will be needed.**

Description of Assets

Value

Separate Property

Nissan Altima, 2010, VIN#123456789

**Be sure to include vehicle identification numbers (VINs) on all vehicles**

\$6,000.00

**Total Value Separate Miscellaneous Property**

\$6,000.00

Community Property

Furniture

\$4,000.00

Jewelry

\$2,500.00

Nissan Sentra 2018, VIN#123456789123456789

\$20,000.00

Total

\$26,500.00

Less: Spouse's One-Half Community Property

\$13,250.00

Interest                      50%

**Ward's Community Property Interest**

\$13,250.00

**SCHEDULE F  
CLAIMS PAYABLE TO THE ESTATE OF  
JOHN SMITH, PR-2025-123**

**If claims are owed to the estate by a third party (not *debts* owed *by* the Estate) include: the name and known address of the person owing the money, the nature of the Estate's claim, date it was incurred, amount, and whether the claim is community or separate.**

**Description of Assets**

**Separate Property**

Potential claim against individual or entity who may have wrongfully taken funds or personal items of the Ward, forged the Ward's signature to take funds, and/or unduly influenced the Ward to give funds away held in Wards personal account(s).	\$25,000.00
<b>Total Value of Separate Claim:</b>	<b>\$25,000.00</b>

**Community Property**

Homeowners Ins - Roof Claim for damage to roof, PO Box 12345, Denton, TX 76201, Policy #xxxxxxx1234	\$1,250.00
IRS claim for refund of overpayment of taxes	\$2,000.00
Total	\$3,250.00
Less: Spouse's One-Half Community Property Interest                      50%	\$1,625.00
<b>Ward's Community Property Interest</b>	<b>\$1,625.00</b>