

IN THE CIRCUIT COURT OF _____ COUNTY, WEST VIRGINIA

For Clerk's Use Only

IN RE: _____, A PROTECTED PERSON

DATE FILED: _____ CASE NUMBER _____ - G - _____

INVENTORY OF CONSERVATOR

[*West Virginia Code: § 44A-3-8*]

INSTRUCTIONS FOR COMPLETION OF INVENTORY

- A. This form is a required submission under *West Virginia Code: § 44A-3-8* and must be filed within sixty (60) days of the appointment of a conservator. The law requires that the inventory include, with reasonable detail, a listing of each item in the estate of the Protected Person, each item's approximate fair market value and the type and amount of any lien or encumbrance against such item. The conservator must include all items which come into the conservator's possession *and* all items the conservator *knows* are part of the Protected Person's estate. This includes any items that the conservator believes are valueless and intends to abandon. The inventory, and any subsequent amended inventories, must be filed with the Circuit Court Clerk.
- B. If the conservator discovers or comes into possession of any real or personal property of the Protected Person after the filing of this inventory, the conservator is required to file either an amended inventory including the property *or* the conservator must list such property, its value and any encumbrances against such property, in the next accounting required to be filed by the conservator under *West Virginia Code: § 44A-3-9*.
- C. Not later than fourteen (14) days following presentation of this inventory with the Circuit Court Clerk, the conservator must mail a copy of the inventory to each individual and entity receiving notice of the hearing on the petition to appoint the conservator. If the matter has been referred to a fiduciary commissioner or other person by the Court to review conservator accountings, the conservator shall also file a copy of this inventory, and any amended inventory, with such fiduciary commissioner or other person referred to by the Court.
- D. If you need additional space to list assets, attach additional pages as needed and identify the schedule supplemental for each item appearing on any attached page(s). Be sure you include the value of any such asset to the total value in the particular schedule.

PLEASE TURN TO THE NEXT PAGE TO BEGIN INVENTORY.

Name of Protected Person: _____ Court Case Number _____ -G- _____

Name of Conservator: _____ Date of Appointment: _____

This report is an [check any applicable category]:

_____ initial inventory _____ amended inventory

Date of this inventory: _____ If this is an amended inventory, date of initial inventory: _____

SCHEDULE A: Describe any real estate, or any interest in any real estate. Provide a complete legal description of each parcel owned and the percentage of interest owned in each parcel.	ASSESSED VALUE	FAIR MARKET VALUE
TOTAL (enter total here and in Schedule H, Line 1)		

SCHEDULE B: List items of tangible personal property of every kind in as much detail as is reasonable.	FAIR MARKET VALUE
TOTAL (enter total here and in Schedule H, Line 2)	

SCHEDULE C: List bonds and securities of every kind	FAIR MARKET VALUE
TOTAL (enter total here and in Schedule H, Line 3)	

SCHEDULE D: Corporate Stock of every kind				
NAME OF COMPANY	CLOSELY HELD	NUMBER OF SHARES	MARKET VALUE PER SHARE	TOTAL MARKET VALUE
TOTAL (enter total here and in Schedule H, Line 4)				

SCHEDULE E: Money, bank accounts, certificates of deposit, notes, accounts receivable.	FAIR MARKET VALUE
TOTAL (enter total here and in Schedule H, Line 5)	

SCHEDULE F: List any other assets not mentioned above.	FAIR MARKET VALUE
TOTAL (enter total here and in Schedule H, Line 6)	

SCHEDULE G: Liens and Encumbrances. Provide a complete list of any and all liens and encumbrances against any of the property listed in this inventory.		
NAME AND ADDRESS OF HOLDER OR BENEFICIAL OWNER OF LIEN OR ENCUMBRANCE	ITEM OF PROPERTY AGAINST WHICH THE LIEN OR ENCUMBRANCE EXISTS	BALANCE OF LIEN OR ENCUMBRANCE
TOTAL LIENS AND ENCUMBRANCES (enter total here and in Schedule H, Line 8)		

STATE OF _____

COUNTY OF _____, to-wit:

I, _____, the conservator named in this inventory, do hereby certify that the information provided in this **INVENTORY OF CONSERVATOR**, including any additional pages annexed hereto, is true, correct and complete to the best of my knowledge, information and belief. I further certify that I have conducted a diligent effort to ascertain the real and personal property of the estate of the above named Protected Person and that I have made answers to each of the questions and schedules of this inventory as required by law and believe the answers contained herein to be correct and that the foregoing is a complete and true inventory of **ALL** of the real and personal property of the Protected Person.

Given under my hand this _____ day of _____ [month], _____ [year].

CONSERVATOR'S SIGNATURE

The foregoing was taken, sworn and subscribed to before me this _____ day of _____ [month], _____ [year].

[AFFIX NOTARIAL SEAL]

NOTARY PUBLIC

My Commission Expires: _____.