Instructions for Completing the ESTATE INVENTORY:

NOTE: For definitions and other helpful resources, please visit our website at www.cobbcounty.org/courts/probate-court

Fill out the name of the Decedent, your name, Estate Number, and date of Decedent's death in the heading.

As noted on the form, do not include assets that passed at the Decedent's death by beneficiary designation, joint tenancy with rights of survivorship, or other operation of law.

Real Property:

This section should include all real property that Decedent owned at the time of his/her death that did not pass from the decedent by operation of law.

- List the address or, if none, tax parcel number or other description of the property;
- List the Decedent's ownership interest in said property. For example, if solely owned by Decedent, this should reflect 100%; if jointly owned, this should reflect the % of Decedent's interest;
- List the total mortgage balance, if any;
- List the estimated total fair market value of the property. This can come from a recent appraisal, the tax assessed value, or other reasonably accurate source;
- Do this for each parcel of property in which the Decedent owned an interest; then
- Add the estimated fair market value of all parcels and enter it as the TOTAL EST. FAIR MARKET VALUE OF REAL PROPERTY.

Financial Assets:

Bank or Credit Union Accounts/Liquid Assets: This section should include all checking, savings, or other liquid accounts owned by the Decedent at the time of his/her death that did not pass by beneficiary designation, pay on death designation, or other operation of law.

- List the name of each bank, credit union, or other financial institution in which the Decedent had an account;
- List the last 4 digits of each account number in which the funds are deposited;
- List the approximate balance of each account as of the date of Decedent's death. If you are a ***successor*** personal representative, you may list the information for each account still in the name of the estate or the name of the Decedent at the time your Letters issued instead;
- You must include as an attachment proof of the account information reflected in this section. For example, you may attach copies of bank account statements or other documentation from the financial institution. If you are unable to provide any of the necessary information for any account, you must provide an explanation for the missing information; then
- Add the account balance for all accounts and enter it as the TOTAL BALANCE OF BANK/CREDIT UNION/LIQUID ASSETS.

Other Financial Accounts/Assets: This section should include all brokerage accounts, stocks, bonds, CDs, mutual funds, and other securities owned by the Decedent at the time of his/her death that did not pass from the decedent by beneficiary designation, pay on death designation, or other operation of law.

- List a description of each financial account or asset. If held in a specific financial institution or brokerage, this should include the name of such entity;
- List the last 4 digits of each account number in which assets are held, if any;
- List the approximate value of each financial account or asset as of the date of Decedent's death;
- You must include as an attachment proof of the account information reflected in this section. For example, you may attach copies of account statements or other documentation from the financial institution. If you are unable to provide any of the necessary information for any account, you must provide an explanation for the missing information; then
- Add the value of all assets and enter it as the TOTAL VALUE OF OTHER FINANCIAL ACCOUNTS/ASSETS.

Other Personal Property/Effects

Vehicles, Boats, Campers, Trailers: This section should include any motor vehicle, boat, camper, trailer owned by the Decedent at the time of his/her death that did not pass from the decedent by operation of law.

- List a description of each asset. This should include make, model, and/or VIN, if applicable;
- List the approximate fair market value of each asset as of the date of Decedent's death.

Miscellaneous Personal Property and Personal Effects: This section should include any other personal property or personal effects with objective value owned by the Decedent at the time of his/her death that did not pass from the decedent by operation of law. (Examples could include antiques; jewelry; stamp, coin, gun collections; or other valuable things.)

- List a description of each asset. Include the quantity, if applicable;
- List the approximate fair market value of each asset as of the date of Decedent's death.

Add the value of all vehicles, boats, campers, trailers, and miscellaneous personal property and personal effects and enter it as the TOTAL EST. VALUE OF OTHER PERSONAL PROPERTY/EFFECTS.

Other

This section should include any business interest, claim, or other asset owned by the Decedent at the time of his/her death that is not otherwise listed elsewhere in the Inventory.

- List a description of the asset to the best of your ability;

- List the approximate value of each asset.

Amount of Current Bond

If you were required to post a bond at any point prior to the filing of your Estate Inventory, list it under AMOUNT OF CURRENT BOND.

If for any reason the Estate Inventory does not reflect the true condition of the Estate as provided, include any note or memorandum of any other facts necessary to understand such condition.

Verification

Your Estate Inventory must be verified in order to be approved by the Court. By signing the Verification and Certification by Fiduciary, you are certifying that the Estate Inventory contains a true and correct statement of the assets of the Decedent to be best of your knowledge and that you have delivered a copy of the Estate Inventory to all heirs or beneficiaries of the Estate and to the Surety on your bond, if any.

You must sign and print your name before a notary public or clerk of the Probate Court. The notary or clerk must sign and date his or her signature and stamp the Verification with his or her notary seal.

If represented by an attorney, the attorney must sign and fill out his or her contact information where indicated.

Certificate of Mailing of Estate Inventory

Fill in the name of the Decedent, the name of the Personal Representative(s), and the Estate Number

List the name and address of each heir or beneficiary and the Surety on your bond, if any, to whom you have mailed a copy of your Estate Inventory. If you delivered a copy by any other method than first class mail, indicate the method you used to deliver it.

The Personal Representative (or attorney, if delivery was accomplished by counsel) must sign and print his/her name where indicated.