

State of Minnesota

County of \_\_\_\_\_

**District Court**  
**Judicial District**  
**Probate / Mental Health Division**  
 Court File No. \_\_\_\_\_  
 Case Type: 14, Conservatorship

**In Re: Conservatorship of**

**INVENTORY**

\_\_\_\_\_,  
**Protected Person**

Date of Appointment: \_\_\_\_\_

The Inventory is summarized on these pages. Pursuant to General Rule of Practice for District Courts, Rule 11, restricted identifiers and financial source documents are confidential. See Forms 11.1 and 11.2. Do not list financial account numbers or social security numbers on this form. List such information on Form 11.1.

**CLASS I PROPERTY: Real Estate**

<b>Real Estate</b> <i>Specify plat or survey description. Specify encumbrances, liens, etc., and respective sums for each.</i>	Amount	Total
a. Homestead: located in the County of _____; Legally described as:		
b. Non-homestead real property: located in the County of _____, legally described as:		
<b>Total Class I Property: Real Estate</b>		

**CLASS II PROPERTY: Personal Property**

a. Furniture and Household Goods <i>(attach statement if needed)</i>	Amount	Total
1.		
2.		
3.		
4.		
<b>a. Total Furniture, Fixtures and Household Goods:</b>		

b. Wearing Apparel <i>(attach statement if needed)</i>	Amount	Total
1.		
2.		
3.		
4.		
<b>b. Total Wearing Apparel:</b>		

c. Corporate Stocks <i>(attach statement if needed)</i> <i>Corporate name, number of shares and value per share</i>	Amount	Total
1.		
2.		
3.		
4.		
<b>c. Total Corporate Stock:</b>		

d. Bank Accounts – Certificates of Deposit <i>(attach statement if needed)</i> <i>Specify Institutions and Balances –</i> <i>List Account Numbers on Confidential Form 11.1</i>	Amount	Total
1.		
2.		
3.		
4.		
<b>d. Total Bank Accounts and Certificates of Deposit:</b>		

Other Personal Property <i>(attach statement if needed)</i>	Amount	Total
1. Attach statement if needed		
2.		
3.		
4.		
<b>e. Total Other Personal property:</b>		

<b>Total Class II Property: Personal Property</b> Subtotal of Class II items: a, b, c, d and e <i>(List this amount on Line 1 of the First Annual Account, Form 14)</i>		
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**Total Real and Personal Property**

Total Class I Property: Real Estate		
Total Class II Property: Personal Property		
<b>Total Class I and Class II Property</b>		

STATE OF MINNESOTA

COUNTY OF \_\_\_\_\_

\_\_\_\_\_ being duly sworn/affirmed hereby swears that s/he is the conservator of the estate for the above-entitled protected person, that s/he has read the inventory and knows its contents, including the confidential provisions herein, and that the same is a true and correct Inventory of the protected person's estate that has come into the conservator's possession and that a copy of the Inventory has been given to the protected person, by \_\_\_\_\_ MAIL or \_\_\_\_\_ IN PERSON by \_\_\_\_\_ (by whom served).

Dated: \_\_\_\_\_, 20\_\_

\_\_\_\_\_  
Signature of Conservator  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Telephone: \_\_\_\_\_

Subscribed and Sworn to before me  
this \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Signature of Notary

Name of Petitioner's Attorney:  
Name: \_\_\_\_\_  
License No.: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Telephone: \_\_\_\_\_

# INSTRUCTIONS

1. Inventory must be filed with the court within 60 days of being appointed conservator (along with forms 11.1 and 11.2 discussed below). The inventory identifies the protected person's assets. You may find other assets after you have filed the Inventory. That is normal.
  - 1.1 Subsequently found assets are added in the annual account (Form 14-C).
  - 1.2 Generally only list the protected person's assets. If assets are owned jointly or partially with another person, list the full value of the asset in the description and identify the protected person's share of the asset, but list the value of the protected person's share in the "Total" column.
2. Class I Property is real estate owned by the protected person. "Real estate" or "real property" is listed separately from personal property.
  - 2.1 Provide the legal description of the real property and the address of the real property.
  - 2.2 The legal description found on the tax statements is often insufficient and usually does not include the full legal description. The tax statements also do NOT list the owners of the property. The tax statements just list the persons to whom the tax statements are mailed. Most counties allow you to look-up the property to acquire the full legal description and legal owners.
  - 2.3 The value of the real estate is an estimate. The tax statements might be reasonable. This value is based upon facts and circumstances. An appraisal is usually not necessary unless you anticipate selling the property in the near future or if the real property will be subject to refinancing or other activity in the near future.
  - 2.4 Include the amount of liens and encumbrances. List the amount of outstanding mortgages or liens, and include any unpaid back taxes due on the real estate.
  - 2.5 **Account Numbers:** List the loan account numbers on form 11.1-C (form is above, process discussed below) and not on the Inventory.
3. Class II Property is all other property except real estate.
  - 3.1 The extent of itemization of personal property in each category, particularly the tangible personal property such as clothing and furniture, depends upon facts and circumstances. Sometimes a detailed list by an appraiser is best. Sometimes a simple estimate of total assets is best. Generally, it is in the best interests of the conservator and protected person to have a detailed list of assets to prevent accusations of theft or failure to account. Whether an appraisal is needed depends upon the value of the assets itemized and the ability of the protected person to pay for the appraisal.
  - 3.2 **Account Numbers:** List the bank account numbers, annuity numbers and all related identifying numbers, on form 11.1-C (form is above, process discussed below) and not on the Inventory.
  - 3.3 List the current market value in the value column for the asset.
4. The real property total value (Class I Property) is not listed on the annual account.
5. The personal property (Class II Property) carries forward to Line 1 of the annual account (form 14-C).
6. **Form 11.2.** This form is filed with the Inventory. This is a public document that informs the public the nature of information filed with the court in Form 11.1 that is Confidential.
7. **Form 11.1.** This form is filed with the Inventory and is not available to the public. This form contains the account numbers and other confidential information that is not available to the public.

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District Court  
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Case Type: 14, Conservatorship

In Re: Conservatorship of  
\_\_\_\_\_, Protected Person

**CONSERVATORSHIP INVENTORY  
SEALED FINANCIAL SOURCE  
DOCUMENTS  
FORM 11.2**

(Provided in Accordance With Rule 11 of the Minnesota  
General Rules of Practice)

THIS LISTING OF SEALED FINANCIAL SOURCE DOCUMENTS IS ACCESSIBLE TO THE PUBLIC BUT THE SOURCE DOCUMENTS SHALL NOT BE ACCESSIBLE TO THE PUBLIC EXCEPT AS AUTHORIZED BY COURT RULE OR ORDER

- Bank statements  
Periods covered: \_\_\_\_\_
- Credit card statement  
Periods covered: \_\_\_\_\_
- Verification of Funds on Deposit
- Verification of Stocks and Other Securities
- Other: \_\_\_\_\_

Information supplied by:

\_\_\_\_\_

Dated: \_\_\_\_\_  
Name of Petitioner's Attorney:  
Name: \_\_\_\_\_  
License No.: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Telephone: \_\_\_\_\_

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**CONSERVATORSHIP INVENTORY**  
**CONFIDENTIAL INFORMATION FORM 11.1**  
(Provided in Accordance With Rule 11 of the Minnesota  
General Rules of Practice)

**The information on this form is  
confidential and shall not be placed  
in a publicly accessible portion of a file.**

NAME

SOCIAL SECURITY NUMBER

BANK ACCOUNT NUMBERS

OTHER FINANCIAL ACCOUNT NUMBERS

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_
- 6. \_\_\_\_\_
- 7. \_\_\_\_\_
- 8. \_\_\_\_\_
- 9. \_\_\_\_\_
- 10. \_\_\_\_\_
- 11. \_\_\_\_\_
- 12. \_\_\_\_\_

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\_\_\_\_\_

\* Add supplemental information if needed

Information supplied by:

\_\_\_\_\_

Dated: \_\_\_\_\_  
Name of Petitioner's Attorney:  
Name: \_\_\_\_\_  
License No.: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Telephone: \_\_\_\_\_