

RECEIVED:



- Instructions:**
- 1) An involuntary or voluntary conservator of the estate may use this form to file an inventory of the assets of a person under conservatorship.
 - 2) The fiduciary is required to file an initial inventory within two months from the date of appointment. If the fiduciary has settled a claim on behalf of the person under conservatorship, then the fiduciary must file the inventory, or a supplemental or substitute inventory, within 30 days of receipt of settlement proceeds.
 - 3) List real property (and attach a complete copy of the recorded deed) and personal property in the manner described. In Part 1, list all solely owned property of the person under conservatorship, including fractional shares, along with the value of the conserved person's interest; use market value as of date of appointment. In Part 2, list jointly owned property with rights of survivorship, property passing by beneficiary designation, property in which the conserved person has a beneficial interest (for example, trust property) and real property located outside the state of Connecticut, as applicable.
 - 4) The fiduciary must send a copy of the inventory to each party and attorney and certify to the court that a copy has been sent.
 - 5) For more information, see C.G.S. section 45a-340 et seq. and Probate Court Rules of Procedure, sections 33.8, 33.9 and 33.11.
 - 6) Type or print in ink. Use an additional sheet, or PC-180, if more space is needed.

Probate Court Name	District Number
---------------------------	------------------------

Estate of

Fiduciary (Include position of trust.)	Date of Appointment as Fiduciary
---	---

INITIAL INVENTORY	SUBSTITUTE OR CORRECTED	SUPPLEMENTAL
-------------------	-------------------------	--------------

Part 1 - Solely Owned Property

Description	Net Value
-------------	-----------

(a) REAL PROPERTY (Attach a complete copy of the recorded deed. Provide property address, decedent's or respondent's interest in the property, fair market value, balance of unpaid mortgage and net value of interest. If unpaid mortgage is higher than fair market value, net value is reported as zero.)	
---	--

(b) PERSONAL PROPERTY 1. Motor Vehicle(s) (Provide year, make, model and vehicle identification number.)	
--	--

Estate of

Description	Net Value
(b) PERSONAL PROPERTY	
2. Bank Accounts (Provide name of financial institution and last four digits of the account number for each account.)	
3. Stocks and Bonds (Provide description, number of shares and value per share.)	
4. Other Personal Property (Include description.)	
5. Total from Additional Sheets Attached, if any	
TOTAL	

Part 2 – All Other Property

Description	Total Market Value	Conserved Person's Interest
(a) JOINTLY OWNED PROPERTY		
1. Real Property Located in Connecticut		
2. Bank Accounts (Provide description, number of shares and value per share.)		
3. Other Jointly Owned Property		

Estate of _____

Part 2 – All Other Property

	Description	Total Market Value	Conserved Person's Interest
(b)	PROPERTY OF PERSON UNDER CONSERVATORSHIP THAT WILL PASS BY BENEFICIARY DESIGNATION (for example, transfer or payable on death accounts, retirement accounts, brokerage accounts)		

(c) **PROPERTY IN WHICH PERSON UNDER CONSERVATORSHIP HAS BENEFICIAL INTEREST** (for example, trust property)

(d) **REAL PROPERTY LOCATED OUTSIDE CONNECTICUT**

The representations made in this inventory are made under penalty of false statement.

Signature of Fiduciary

Type or Print Name

Date

Signature of Fiduciary

Type or Print Name

Date

CERTIFICATION

I hereby certify that a copy of this inventory was sent to the following persons as required by Probate Court Rules of Procedure, section 33.8:

Name and Address

Signature of fiduciary or attorney _____

Type or Print Name _____

Date _____