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- Instructions:**
- 1) A trustee of a testamentary trust may use this form to file an inventory of the estate assets. A “testamentary trust” is defined under C.G.S. section 45a-499c(28) as a “trust created under a will and, unless expressly provided, any trust established pursuant to an order of the Probate Court.”
 - 2) The fiduciary is required to file an initial inventory within two months from the date of appointment.
 - 3) List real property (and attach a complete copy of the recorded deed) and personal property in the manner described. List trust property using acquisition value as defined in Probate Court Rules of Procedure, section 36.14(a)(2).
 - 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.
 - 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

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	

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

Estate of _____

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 32.4:

Name and Address

Signature of fiduciary or attorney _____

Type or Print Name _____

Date _____