Minor Conservator Inventory and Asset Management Program

GEORGIA PROBATE COURT STANDARD FORM

STATE OF GEORGIA MINOR: ESTATE NO CONSERVATOR(S): MINOR CONSERVATORSHIP INVENTORY AND ASSET MANAGEMENT PLAN SHORT FORM A. INVENTORY A. INVENTION Broker Acct. No. A. S. A. S		PROBATE CO	OURT OF		COUN	NTY
CONSERVATOR(S):						
AND ASSET MANAGEMENT PLAN SHORT FORM  A. INVENTORY AND ASSET MANAGEMENT PLAN SHORT FORM  A. INVENTORY Checking/Savings/Money Market/Certificates of Deposit/Liquid Accounts:  Bank/Financial Institution/Broker Acct. No. S. S. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. C. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. C. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. C. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. C. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. C. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. C. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. C. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. C. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. C. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. C. Stocks/Bonds/Investment and profit-sharing accounts S. C. Stocks/Bonds/Investment income S. C. Stocks/Bonds/Investment income S. C. Stocks/Bonds/Investment income S. C. Stocks/Bonds/Investment income S. C. Stockal Security S	MIN	DR:			ESTATE NO.	
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AND ASSET MANAGEMENT PLAN SHORT FORM  A. INVENTORY Approximate Current Value 1. Checking/Savings/Money Market/Certificates of Deposit/Liquid Accounts:  Bank/Financial Institution/Broker Acct. No. S. S. S. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. S. S. Stocks/Bonds/Investments (including retirement and profit-sharing accounts): Brokerage Firm or Institution Acct. No. S. S. S. S. Real Estate: Brief Description Minor's Interest Co-Owner(s) S. S. S. C. Personal Property (Vehicles, furniture, etc.): Description S.						
1. Checking/Savings/Money Market/Certificates of Deposit/Liquid Accounts:         Bank/Financial Institution/Broker       Acct. No.         \$						Μ
Bank/Financial Institution/Broker       Acct. No.       \$	A.					eximate Current Value
\$       \$         \$       \$         2. Stocks/Bonds/Investments (including retirement and profit-sharing accounts):       \$         Brokerage Firm or Institution       Acct. No.         \$       \$         3. Real Estate:       \$         Brief Description       Minor's Interest       Co-Owner(s)         \$       \$         4. Personal Property (Vehicles, furniture, etc.):       \$         Description       \$         \$       \$         Brief Description       \$         \$	1. Ch	ecking/Savings/Money Market/	Certificates of Depo	osit/Li	quid Accounts:	
\$       \$         2. Stocks/Bonds/Investments (including retirement and profit-sharing accounts):       \$         Brokerage Firm or Institution       Acct. No.         \$       \$         3. Real Estate:       \$         Brief Description       Minor's Interest       Co-Owner(s)         \$       \$         4. Personal Property (Vehicles, furniture, etc.):       \$         Description       \$         \$       \$         TOTAL ASSET VALUE:       \$         \$       \$         Description       \$         \$       \$         COTAL ASSET VALUE:       \$         \$       \$         Description       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$         \$       \$ <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>						
\$       \$         2. Stocks/Bonds/Investments (including retirement and profit-sharing accounts):       Brokerage Firm or Institution       Acct. No.         \$       \$       \$         3. Real Estate:       \$       \$         Brief Description       Minor's Interest       Co-Owner(s)         \$       \$       \$         4. Personal Property (Vehicles, furniture, etc.):       \$       \$         Description       \$       \$         TOTAL ASSET VALUE:       \$       \$         B.       ESTIMATED MONTHLY INCOME FROM ALL SOURCES       \$         Interest, dividend, or investment income       \$       \$         Social Security       \$       \$       \$         Other (describe)       \$       \$       \$						
2. Stocks/Bonds/Investments (including retirement and profit-sharing accounts):          Brokerage Firm or Institution       Acct. No.						
Brokerage Firm or Institution Acct. No. Brokerage Firm or Institution Acct. No. S S S S A. Personal Property (Vehicles, furniture, etc.): Description S TOTAL ASSET VALUE: B. ESTIMATED MONTHLY INCOME FROM ALL SOURCES Interest, dividend, or investment income Social Security Other (describe) S S S S S S S S S						_ \$
\$	2. Sto	ocks/Bonds/Investments (includi	ing retirement and p	orofit-s	sharing accounts)	:
\$		Brokerage Firm or Instituti	ion Acct. No	).		
<ul> <li>3. Real Estate:</li> <li>Brief Description Minor's Interest Co-Owner(s) <ul> <li>\$</li></ul></li></ul>						_ \$
Brief Description       Minor's Interest       Co-Owner(s)						_ \$
4. Personal Property (Vehicles, furniture, etc.):   Description \$	3. Re	al Estate:				
4. Personal Property (Vehicles, furniture, etc.):       \$		Brief Description	Minor's Interest		Co-Owner(s)	
<ul> <li>4. Personal Property (Vehicles, furniture, etc.): <ul> <li>Description</li> <li>\$</li></ul></li></ul>						<u>\$</u>
Description       \$						
S       \$         S       \$         TOTAL ASSET VALUE:       \$         B.       ESTIMATED MONTHLY INCOME FROM ALL SOURCES         Interest, dividend, or investment income       \$         Social Security       \$         Other (describe)       \$	4. Pe	rsonal Property (Vehicles, furnit	ture, etc.):			
S       S         TOTAL ASSET VALUE:       S         B.       ESTIMATED MONTHLY INCOME FROM ALL SOURCES         Interest, dividend, or investment income       S         Social Security       S         Other (describe)       S		Description				
TOTAL ASSET VALUE:       \$						<u>\$</u>
B. ESTIMATED MONTHLY INCOME FROM ALL SOURCES Interest, dividend, or investment income \$						<u>\$</u>
B. ESTIMATED MONTHLY INCOME FROM ALL SOURCES Interest, dividend, or investment income \$						
Interest, dividend, or investment income\$Social Security\$Other (describe)\$		TOTAL ASSET VALUE:	<u>.</u>			<u>\$</u>
Interest, dividend, or investment income\$						
Social Security     \$	В.			ALLS	SOURCES	¢
Other (describe) \$			ent meome			۶ \$
IUIAL AVEKAGE MUNIHLY INCUME: 5		Other (describe)			-	\$
The minor:			<u>IELY INCOME</u> :			<u> </u>

GPCSF59

I. is not a beneficiary of a Trust

\_\_\_\_\_ II. is a beneficiary of a Trust, and the following is the name of the Trust, the Trustee, his/her address, and telephone number; state when and how payments are required to made under the Trust and the criteria for payment (attach outline if necessary): \_\_\_\_\_

### C. <u>BUDGET</u>

I/We plan during the following reporting year (initial one)

\_\_\_\_\_a. not to expend any of the minor's funds but to allow it to accumulate; OR
\_\_\_\_\_b. to expend the **interest earned** on the minor's estate for the following purposes: \_\_\_\_

\_\_\_\_; OR

\_\_\_\_\_c. regardless of interest earned, to expend from the minor's estate the sum of

\$\_\_\_\_\_ per month for the following purposes: \_\_\_\_\_

; and

If b. or c. above is selected, the following is the monthly estimated expenses for the care, support, health and education of the minor:

Room and board allowance:	\$
Child care:	\$
School Tuition/Supplies/Expenses/Lunches:	\$
Clothing/Diapers/Grooming/Hygiene:	\$
Medical/Dental/Prescription:	\$
Health/Life/Disability Insurance:	\$
Entertainment/Activities:	\$
Personal Caretakers/Home Health Care:	\$
Transportation	\$
Miscellaneous:	\$
Average Monthly Expenses	\$

#### SUMMARY

Requested spending amount	\$
3. Less Average Monthly Expenses	
Subtotal	\$
2. Monthly support provided by parent(s)	\$
1. Average Monthly Income	\$

#### D. <u>ASSET MANAGEMENT PLAN</u>

\_\_\_\_\_a. maintain the investment plan for the minor's assets as indicated in the above Inventory, OR

\_\_\_\_\_b. expend the amount requested above and maintain and invest the remaining funds as authorized by law or in accordance with an investment plan approved by the court.

### E. <u>AFFIDAVIT</u>

I/We, \_\_\_\_\_\_, Conservator(s) of the above minor, do swear that the foregoing Inventory and Asset Management Plan contains a just, true, and complete inventory and budget of all property belonging to said minor within my/our possession, control, or knowledge, in addition to the financial information of the parent(s), if provided. This Inventory and Asset Management Plan has been provided to the Guardian of the ward, if any, by first class mail.

Sworn to and subscribed before me this day of, 20	Conservator
NOTARY/CLERK OF PROBATE COURT	Printed Name
My Commission Expires: Sworn to and subscribed before	
me this day of, 20	Co-Conservator, if any
NOTARY/CLERK OF PROBATE COURT My Commission Expires:	Printed Name

# IN THE PROBATE COURT OF \_\_\_\_\_ COUNTY

## STATE OF GEORGIA

IN RE:	) ESTATE NO.
	) ) ASSET MANAGEMENT PLAN
MINOR,	
,	) )
CONSERVATOR(S)	)
	ORDER
The Conservator(s) having filed an Inv , 20,	ventory/Asset Management Plan for the above estate on
	l Inventory/Asset Management Plan is hereby
APPROVED.	
(initial if applicable)	
IT IS FURTHER ORDERE	<b>D</b> that Conservator(s) is/are authorized to disburse from the
minor's estate	
a. the sum of \$	per month for the support of the minor.
b. the income for the sup	port of the minor.
	distribution of \$ for the following
	id Conservator(s) shall show in the annual return how such
funds actually were spent.	
<b>SO ORDERED</b> this day of _	, 20
Probate Judge	;
FILED: DATE	
DEPUTY CLERK	