

INVENTORY, APPRAISEMENT, AND LIST OF CLAIMS QUESTIONNAIRE

Please use this worksheet to provide us with complete information concerning all property in the estate of the decedent at the time of his or her death. If you need additional space, please attach a separate sheet of paper and reference the number of the category you are supplementing.

Community Property

1. REAL PROPERTY:

Parcel #1: \$ _____

Address:

Legal Description:

[repeat on to Parcel #2, etc., each parcel to include the same information as above, with a value for each parcel]

2. HOUSEHOLD PROPERTY: \$ _____

3. MOTOR VEHICLES

Vehicle #1: \$ _____

Description:

VIN No:

[repeat on to Vehicle #2, etc., each vehicle to include the same information as above, with a value for each vehicle]

4. CASH, MORTGAGES AND NOTES:

Account #1: \$ _____

Institution:

Account Type:

Account/CD No.

[repeat on to Account #2, etc., each account to include the same information as above, with a value for each account]

Note: As to any mortgages or notes the estate may own, give the date of the instrument, the original principal sum, interest rate, whether or not the debt is secured and the balance due – value.

5. INSURANCE PAYABLE TO THE ESTATE:

Policy #1: \$ _____

Insurer:

Policy No.

[repeat on to Policy #2, etc., each policy to include the same information as above, with a value for each policy]

6. SECURITIES:

Security #1: \$ _____

Description:

[repeat on to Security #2, etc., each security to include the same information as above, with a value for each security]

7. JOINTLY OWNED PROPERTY: \$ _____

[here describe any property jointly held with someone else, with a value for each such property item]

8. MISCELLANEOUS PROPERTY:

Item #1: \$ _____

[here list everything that has not fit into one of the other categories, with a value for each.]

Separate Property

9. REAL PROPERTY:

Parcel #1: \$ _____

Address:

Legal Description:

[repeat on to Parcel #2, etc., each parcel to include the same information as above, with a value for each parcel]

10. HOUSEHOLD PROPERTY: \$ _____

11. MOTOR VEHICLES

Vehicle #1: \$ _____

Description:

VIN No:

[repeat on to Vehicle #2, etc., each vehicle to include the same information as above, with a value for each vehicle]

12. CASH, MORTGAGES AND NOTES:

Account #1: \$ _____

Institution:

Account Type:

Account/CD No.

[repeat on to Account #2, etc., each account to include the same information as above, with a value for each account]

Note: As to any mortgages or notes the estate may own, give the date of the instrument, the original principal sum, interest rate, whether or not the debt is secured and the balance due – value.

13. INSURANCE PAYABLE TO THE ESTATE:

Policy #1: \$ _____

Insurer:

Policy No.

[repeat on to Policy #2, etc., each policy to include the same information as above, with a value for each policy]

14. SECURITIES:

Security #1: \$ _____

Description:

[repeat on to Security #2, etc., each security to include the same information as above, with a value for each security]

15. JOINTLY OWNED PROPERTY: \$ _____

[here describe any property jointly held with someone else, with a value for each such property item]

16. MISCELLANEOUS PROPERTY:

Item #1: \$ _____

[here list everything that has not fit into one of the other categories, with a value for each]