

Information or instructions: ~~Inventory and appraisement~~

**PREVIEW**

1. The purpose of the inventory and appraisement in a guardianship action is to record and state a value of the property and assets held by the Guardian for the Ward.
2. Sections 729 through 731 of the Texas Probate Code govern the inventory and appraisement process.

a. Per Section 729, the inventory is due on or before 90 days from the date that the Guardian qualified as the Guardian.

b. Many courts require both a legal description and a street address when listing real property

Form: ~~Inventory and appraisement~~

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CAUSE NUMBER \_\_\_\_\_

IN THE MATTER OF:

IN THE COUNTY COURT

THE GUARDIANSHIP OF [PERSON OR ESTATE] OF NAME

NUMBER \_\_\_\_\_

AN INCAPACITATED PERSON

[COUNTY] COUNTY, TEXAS

**THIS DOCUMENT**

~~INVENTORY AND APPRAISEMENT~~

Inventory and Appraisement of the Estate of [Ward's name], presented to the Court by [Guardian's name], Guardian of the Person and Estate of [Ward's Name], Ward:

**1. INVENTORY**

1.1 Real Estate:

a. Community Property:

The Ward herein owns a ~~one-half~~ interest in the following described community real property: \_\_\_\_\_, being subject to a balance of approximately \$[Amount] remaining unpaid upon the purchase price and secured by a mortgage with \_\_\_\_\_,

Loan No. \_\_\_\_\_, the Ward's one-half interest in the property being reasonably valued at a gross amount of \$[Amount].

**THANK YOU**

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b. Separate Property:

**PREVIEW**

The Ward herein owns a \_\_\_\_\_ interest in the following described separate real property: \_\_\_\_\_, being subject to a balance of approximately \$[Amount] remaining unpaid upon the purchase price and secured by a mortgage with \_\_\_\_\_, Loan No. \_\_\_\_\_, the Ward's interest in the property being reasonably valued at a gross amount of \$[Amount].

1.2 Stocks:

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a. Community Property:

The Ward herein owns the following number of shares in the following described stocks: [Name] the Ward's one-half interest in the property being reasonably valued at a gross amount of \$[Amount].

b. Separate Property:

The Ward herein owns the following number of shares in the following described stocks: [Name] the Ward's interest in the property being reasonably valued at a gross amount of \$[Amount].

**THIS DOCUMENT**

1.3 Cash:

a. Community Property:

The Ward's community one-half interest in the following cash and bank accounts, the accounts being in the name of [Name] The Guardian of the Estate of [Ward's name]: [list accounts and balances].

**THANK YOU**

b. Separate Property:

The Ward owns the following cash and bank accounts, the accounts being in the name of [Name] The Guardian of the Estate of [Ward's name]: [list accounts and balances].

1.4

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a. Community Property:

**PREVIEW**

The Ward herein owns a one-half interest in the following described insurance policies, the cash surrender value being \$[Amount].

b. Separate Property:

The Ward herein owns a \_\_\_\_\_ interest in the following described insurance policies, the cash surrender value being \$[Amount].

1.5 Personal Property:

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a. Community Property:

The Ward herein owns a one-half interest in the following described personal property: .

b. Separate Property:

The Ward herein owns a \_\_\_\_\_ interest in the following described insurance policies, the cash surrender value being \$[Amount].

1.6 Community Income of Ward:

**THIS DOCUMENT**

The Ward herein receives \$[Amount] per month in \_\_\_\_\_ benefits.

1.7 Separate Income of Ward:

The Ward herein receives \$[Amount] per month in \_\_\_\_\_ benefits.

## 2. LIST OF ALL CLAIMS DUE AND OWING TO ESTATE

2.1 Claims have been filed with [Where Claims were Filed].

2.2 There are no other claims due and owing to the Estate.

**THANK YOU**

## 3. LIST OF ALL CLAIMS DUE AND OWING BY ESTATE

3.1 .[List]

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I do solemnly swear that the foregoing Inventory and List is a true and complete statement of the property and claims of the Estate of [Ward's name], Ward herein, that have come to my knowledge as of this date.

**PREVIEW**

Respectfully Submitted,

\_\_\_\_\_  
[Law Firm Name]

By

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\_\_\_\_\_  
[Attorney's Name]

Attorney for Applicant  
[Attorney's Address]  
[Telephone Number]  
[Facsimile Number]  
[Bar Card Number]

\_\_\_\_\_  
Guardian

**THIS DOCUMENT**

State of Texas  
County of [Name of county]

On \_\_\_\_\_ before me, the undersigned authority, personally appeared [Name] personally known to me to be the person whose name is subscribed to the foregoing instrument, and acknowledged to me that he or she executed it for the purposes and consideration expressed therein.

Subscribed and sworn to before me on \_\_\_\_\_ by

\_\_\_\_\_  
**THANK YOU**

Signature of officer

\_\_\_\_\_  
Notary's typed or printed name

My commission expires:

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[or Notary's Stamp]

Form: Order approving inventory

# PREVIEW

CAUSE NUMBER \_\_\_\_\_

IN THE MATTER OF:

IN THE COUNTY COURT

THE GUARDIANSHIP OF [PERSON OR  
ESTATE] OF NAME

NUMBER \_\_\_\_\_

AN INCAPACITATED PERSON

[COUNTY] COUNTY, TEXAS

ORDER APPROVING INVENTORY AND APPRAISEMENT

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On \_\_\_\_\_, in the above-mentioned cause, the Court examined the Inventory

and Appraisement filed by the Guardian in the above-numbered and styled cause. No objections having been filed, then Inventory and Appraisement are in order.

IT IS ORDERED, ADJUDGED, AND DECREED, by the Court that said Inventory and Appraisement be approved and together with this Order, be filed in the records of this proceeding.

SIGNED on \_\_\_\_\_

# THIS DOCUMENT

\_\_\_\_\_  
JUDGE PRESIDING

# THANK YOU

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