

# INSTRUCTIONS FOR UPDATED INVENTORY

The purpose of this form is to give an updated listing of what the ward/minor ward/protected person owns or receives.

Use this form if you did not use the form included in your annual packet, or if the court has requested an updated inventory from you.

## HEADING

- i. Choose the county in the drop down box below the first blank.
- ii. Enter the case number assigned by the clerk of the court.
- iii. Enter the name of the ward/minor ward/protected person.

IN THE COUNTY  COURT OF \_\_\_\_\_ COUNTY, NEBRASKA  
 IN THE MATTER OF \_\_\_\_\_  
 Case No.   
  
 Ward/Minor Ward/Protected Person

- i. Enter the ending date of the updated inventory.

The Updated Inventory listed below is as of the ending date of:

- ii. Answer the question if there are any changes to the accounts since you filed your Personal and Financial Information form.
  - a. If you answer “yes” – you must file an Updated Financial Information Form with this form, but DO NOT SEND the Updated Financial Information Form to the Interested Parties.

Are there any changes to any of the accounts identified on your last filed Personal and Financial Information Form? (Check the appropriate box)  Yes  No. If the answer is “Yes”, you must complete an Updated Financial Information form and file it with this form. DO NOT SEND THE UPDATED FINANCIAL INFORMATION FORM TO THE INTERESTED PARTIES.

## BODY OF FORM

The numbers listed below correspond to the numbers of the sections on the form.

### 1. Personal Property –

- a. For ALL checking accounts, savings accounts and certificates of deposit in the name of the ward/minor ward/protected person:

Financial Institution Name	Title on Account	Type of Account (please check one)	Debit Card?	New Account?	Last 4 digits of account number	Balance
<input type="text" value="i"/>	<input type="text" value="ii"/>	<input type="checkbox"/> checking <input type="checkbox"/> savings <input type="checkbox"/> certificate of deposit	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="text" value="vi"/>	<input type="text" value="vii"/>

- i. enter the name of the financial institution (bank).

- ii. enter the name on the account.
- iii. check the box that describes what type of account it is (i.e. checking, savings or certificate of deposit).
- iv. if THIS account has a debit card attached to it, check the box for “yes”, and if it does not have a debit card attached to it, check the box for “no”.
- v. if THIS account is a NEW account, check the box for “yes”, and if it is not a new account, check the box for “no”.
  - 1. If this is a new account opened after the Personal and Financial Information form was filed with the court, you must fill out and file an Updated Financial Information form (CC 16:2.40).
- vi. enter **ONLY the LAST 4 digits** of the account number. This is to protect personal information.
- vii. enter the balance of the account as of the last day of the updated inventory.

- b. For other types of personal property, enter the present value of:
  - i. stocks, bonds and other securities (attach a list of brokerage firms).
  - ii. vehicles.
  - iii. household goods and furnishings.
  - iv. other type of personal property (enter type of property)

	TYPE OF PROPERTY	PRESENT VALUE
i.	Stocks, Bonds and Other Securities (Attach a List of Brokerage Firms)	
ii.	Vehicles	
iii.	Household goods and furnishings	
iv.	Other: _____	

**2. Jointly held Property**

- a. Enter the type of property, who the property is owned with and the present value in the spaces provided.

TYPE OF PROPERTY	WITH WHOM	PRESENT VALUE

**3. Real Property**

- a. If the ward/minor ward/protected person owns or has interest in real property (land, house, etc.) check the box for “yes”, and enter the location/address, legal description and value in the spaces provided.

LOCATION/ADDRESS	LEGAL DESCRIPTION	VALUE
	i.	

- i. Legal property descriptions may be obtained from the Register of Deeds in the county that the property is located. For longer descriptions, reference the location/address and legal description on a separate page.
- ii. **NOTICE** – when the Letters of Guardianship and/or conservatorship are issued, you must file

- them with the Register of Deeds in the county where the real property is located.
- b. If the ward/minor ward/protected person does NOT own or have any interest in real property, check the box for “no”.
- c. Answer the question of “Have the Letters of Guardianship and or Conservatorship been filed with the Register of Deeds in each county where each parcel is located?”

**c.** Have the Letters of Guardianship and/or Conservatorship been filed with the Register of Deeds in each county where each parcel is located?  Yes  No

**4. Income**

- a. Enter the monthly amount received by the ward/minor ward/protected person in the space to the right of the type of income.
  - i. Use the types of income listed or identify a source not already listed under “other”
    - 1. For Wages, identify the employer(s).

SOURCE OF INCOME	MONTHLY AMOUNT
1. Wages - Employer name: <span style="float: right;">i.</span>	

**5. Credit Cards and Other Debt**

- a. If the ward/minor ward/protected person has any credit cards or other debt in their name, check the box for “yes”.

Financial Institution Name	Description	Last 4 digits of account number	Balance as of Last Statement
i.	ii.	iii.	iv.
		____	\$ _____

- i. enter the name of the financial institution;
  - ii. the name on the card or a description of the debt;
  - iii. **ONLY the LAST 4 digits** of the account number (Entering only the last 4 digits is to protect personal information.); and
  - iv. balance as of the last statement.
- b. If the ward/minor ward/protected person does NOT have any credit cards or other debt in their name, check the box for “no”.

**SIGNATURE SECTION**

**If this is a co-guardianship and/or co-conservatorship both must sign.**

For the second signature block to appear, check the (a.) “yes” box on the question located below the first signature block:

a.

Is this a Co-guardianship and/or Co-conservatorship?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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- i. The guardian(s) and/or conservator(s) will sign their name(s).
- ii. Enter the date.
- iii. Print the guardian(s) and/or conservator(s) name(s).

- iv. Enter the guardian(s) and/or conservator(s) street address(es).
- v. If this form is completed by an attorney, there is a space for the bar number and firm name.
- vi. Enter the city, state, and zip code of the guardian(s) and/or conservator(s) address(es).
- vii. Enter the guardian(s) and/or conservator(s) telephone number(s) with area code.
- viii. Enter the email address(es).

<input type="text" value="i."/>	<input type="text" value="ii."/>
Signature of Guardian and/or Conservator	Date:
<input type="text" value="iii."/>	<input type="text" value="iv."/>
Print or Type Name	Address
<input type="text" value="v."/>	<input type="text" value="vi."/>
Bar Number and Firm Name (Attorneys Only)	City, State and Zip Code
<input type="text" value="vii."/>	<input type="text" value="viii."/>
Telephone	E-mail address

## CERTIFICATE OF MAILING

### a. TO THE GUARDIAN AND/OR CONSERVATOR OR THEIR ATTORNEY: You need to complete the Certificate of Mailing form and file it with the court showing that you mailed the required documents to all the interested persons you list.

- i. Enter the name of the ward/minor ward/protected person, the county name, and the case number in the upper left hand corner.

<input type="text" value="i."/>	<input type="text"/>
	Ward/Minor Ward/Protected Person
	<input type="text"/> County Court
	Case No. <input type="text"/>

- ii. If you are completing this form electronically, these will automatically fill in from the information you already entered.
- iii. Enter the name of the person who is swearing that they filed the required forms and mailed the copies of the Updated Inventory and the Notice of Right to Object to the interested persons.(This is the guardian and/or conservator or their attorney)
- iv. List all of the interested persons\* and their addresses on the lines provided.

<input type="text" value="iv."/>	<u>NAME(S) OF INTERESTED PERSON(S)</u>	<u>ADDRESS(ES)</u>
	<input type="text"/>	<input type="text"/>

- v. **IF** there are more names and addresses for interested persons\* than the spaces on the form provide room for, check the box next to “See Attached” and attach a sheet with the name and address of each additional person.

See attached (more names and addresses than above)

### c. SIGNATURE SECTION

**If this is a co-guardianship and/or co-conservatorship both must sign.**

For the second signature block to appear, check the (a.) “yes” box on the question located below the

b.

first signature block:

Is this a Co-guardianship and/or Co-conservatorship?  Yes  No

- i. The guardian(s) and/or conservator(s) will sign their name(s).
- ii. Enter the date.
- iii. Print the guardian(s) and/or conservator(s) name(s).
- iv. Enter the guardian(s) and/or conservator(s) street address(es).
- v. If this form is completed by an attorney, there is a space for the bar number and firm name.
- vi. Enter the city, state, and zip code of the guardian(s) and/or conservator(s) address(es).
- vii. Enter the guardian(s) and/or conservator(s) telephone number(s) with area code.
- viii. Enter the email address(es).

i. \_\_\_\_\_ ii. Date: \_\_\_\_\_  
 Signature of Guardian and/or Conservator

iii. \_\_\_\_\_ iv. \_\_\_\_\_  
 Print or Type Name Address

v. \_\_\_\_\_ vi. \_\_\_\_\_  
 Bar Number and Firm Name (Attorneys Only) City, State and Zip Code

vii. \_\_\_\_\_ viii. \_\_\_\_\_  
 Telephone E-mail address

### NOTICE OF RIGHT TO OBJECT

#### 1. HEADING – If you are completing this form electronically, these will fill in from the information you already entered.

- a. Enter the county where the action is filed.
- b. Enter the case number assigned by the clerk of the court.
- c. Enter the name of the ward/minor ward/protected person.

\_\_\_\_\_ a. \_\_\_\_\_  
 IN THE COUNTY COURT OF \_\_\_\_\_ COUNTY, NEBRASKA

IN THE MATTER OF \_\_\_\_\_ b. No. \_\_\_\_\_

c. \_\_\_\_\_  
 Ward/Minor Ward/Protected Person ADDRESS INFORMATION FOR

#### 2. BODY OF FORM

- a. List the documents you filed, (e.g. Motion to Move Ward/Protected Person out of the state of Nebraska, Application for Withdrawal of Funds)

a. You are notified that \_\_\_\_\_  
 List documents filed

- b. Enter the date you filed the documents you listed.

b. on \_\_\_\_\_  
 Date document(s) filed.

### 3. SIGNATURE SECTION

#### a. If this is a co-guardianship and/or co-conservatorship both must sign.

For the second signature block to appear, check the (a.) “yes” box on the question located below the first signature block:

a.  
Is this a Co-guardianship and/or Co-conservatorship?  Yes  No

- iii. The guardian(s) and/or conservator(s) will sign their name(s).
- iv. Enter the date.
- ix. Print the guardian(s) and/or conservator(s) name(s).
- x. Enter the guardian(s) and/or conservator(s) street address(es).
- xi. If this form is completed by an attorney, there is a space for the bar number and firm name.
- xii. Enter the city, state, and zip code of the guardian(s) and/or conservator(s) address(es).
- xiii. Enter the guardian(s) and/or conservator(s) telephone number(s) with area code.
- xiv. Enter the email address(es).

\* Pursuant to Neb. Rev. Stat. § 30-2601, interested persons are defined as:

- children and spouses;
- future heirs if the ward/incapacitated person/protected person would die without leaving a valid will (brothers and sisters who are adults, grandparents, etc.);
- a trustee of any trust executed by the ward/incapacitated person/protected person;
- if there are no individuals defined as “interested persons” above, include any person or organization named as a “devisee” in the ward’s/incapacitated person’s/protected person’s most recent will;
- after death of the ward/incapacitated person/protected person, interested person also includes the personal representative of a deceased ward’s/incapacitated person’s/protected person’s estate, the deceased ward’s/incapacitated person’s/protected person’s heirs in an intestate estate, and the deceased ward’s/incapacitated person’s/protected person’s devisees in a testate estate;
- any governmental agency paying benefits on behalf of the ward/incapacitated person/protected person; and
- any person designated by order of the court to be an interested person.

If there are no interested persons identified for a ward/incapacitated person/protected person, the court may appoint a guardian ad litem (Nebraska Supreme Court Rule § 6-1449(B)). The cost of the guardian ad litem may be taken from the assets of the ward/incapacitated person/protected person.