

**INVENTORY, AFFIDAVIT OF
DUE DILIGENCE, AND
CERTIFICATE OF MAILING**

NOTICE: To protect personal information, only the last four digits of the account should be provided on this form. Complete account information is provided on the Personal and Financial Information for Guardianships and Conservatorships form.

IN THE COUNTY COURT OF _____ COUNTY, NEBRASKA

IN THE MATTER OF

Case # _____

Ward/Incapacitated Person/Protected Person

**INVENTORY, AFFIDAVIT OF DUE
DILIGENCE, AND
CERTIFICATE OF MAILING**

1. PERSONAL PROPERTY:

Checking Accounts

Bank Name _____

Account no. XXX- _____

\$ _____

Bank Name _____

Account no. XXX- _____

\$ _____

Bank Name _____

Account no. XXX- _____

\$ _____

Savings Accounts

Bank Name _____

Account no. XXX- _____

\$ _____

Bank Name _____

Account no. XXX- _____

\$ _____

Bank Name _____

Account no. XXX- _____

\$ _____

Certificates of Deposit

Bank Name _____

Account no. XXX- _____

\$ _____

Bank Name _____

Account no. XXX- _____

\$ _____

Bank Name _____

Account no. XXX- _____

\$ _____

Stocks and Bonds

\$ _____

Vehicles

\$ _____

Household goods and furnishings

\$ _____

Other: _____

\$ _____

TOTAL:

\$ _____

2. JOINTLY HELD PROPERTY:

With whom _____ \$ _____
What _____ \$ _____
With whom _____ \$ _____
What _____ \$ _____

TOTAL: \$ _____

3. INCOME (Monthly):

Wages - Employer name: _____ \$ _____
Social Security _____ \$ _____
Supplemental Security income _____ \$ _____
Veterans Administration benefits _____ \$ _____
Company pension _____ \$ _____
Interest - From where: _____ \$ _____
Dividends - From where: _____ \$ _____
Other: _____ \$ _____

TOTAL: \$ _____

4. CREDIT CARD(S) belonging to ward/incapacitated person/protected person (If applicable):

Card Name _____
Account no.XXX- _____ \$ _____
Card Name _____
Account no. XXX- _____ \$ _____

TOTAL: \$ _____

See attached (more information than above)

5. REAL PROPERTY (List location by address and value):

Note: 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 and legal description on a separate page.

Location _____ Value \$ _____
Legal description _____

Location _____ Value \$ _____
Legal description _____

Location _____ Value \$ _____
Legal description _____

Location _____ Value \$ _____
Legal description _____

TOTAL: \$ _____

NOTICE: You must file your letters of Guardianship and/or Conservatorship with the Register of Deeds in any county where the ward/incapacitated person/protected person has real property or an interest in real property.

Ward/Incapacitated Person/Protected Person

Case # _____

CERTIFICATE OF MAILING

TO THE GUARDIAN AND/OR CONSERVATOR: You need to complete and file this form with the court showing that you mailed the required documents marked below to all the interested persons you list below.

I, _____, swear or affirm, **under the penalties of perjury**, that I have filed the original Inventory and the required forms marked below with the court and that on the _____ day of _____, 20____ I mailed copies of the forms marked below to all interested persons* and bonding company, if any, at the addresses set forth below:

- Inventory and Affidavit of Due Diligence
- Notice of Interested Party (CC 16:2.10)
- Notice of Right to Object (CC 16:2.16)
- Certificate of Mailing

NAME(S) OF INTERESTED PERSON(S)

ADDRESS(ES)

See attached (more names and addresses than above)

Signature(s) of Guardian(s) and/or Conservator(s)

Date _____

Print or Type Name of Guardian(s) and/or Conservator(s)

Bar Number and Firm Name (attorneys only)

Street Address/P.O. Box of Guardian(s) and/or Conservator(s)

City/State/ZIP Code of Guardian(s) and/or Conservator(s)

Phone(s)

E-mail Address(es)

*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 shall 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.