

**PROBATE COURT OF WHITFIELD COUNTY  
STATE OF GEORGIA**

**Inventory and Asset Management Plan for Minor, Short Form**

<b>IN RE:</b>	:	ESTATE NO: _____
_____	:	Age: _____
<b>Minor</b>	:	Date of Birth: _____
_____	:	Social Security #: _____
<b>Conservator</b>	:	

**1. INVENTORY**

**A. PERSONAL AND INTANGIBLE PROPERTY**

Approximate Current Value

Checking/Savings/Money Market/Certificates of Deposit/Liquid Accounts: \$ \_\_\_\_\_

Stocks/Bonds/Investments (including retirement and profit-sharing accounts): \$ \_\_\_\_\_

Automobiles: (Year/Make/Model) (V.I.N.) (Joint owner (if any)) \$ \_\_\_\_\_

Other assets of significant value: \$ \_\_\_\_\_

**TOTAL VALUE OF PERSONAL PROPERTY**      \$ \_\_\_\_\_

**B. REAL PROPERTY** (Indicate if property is jointly owned and with whom)

Description	County	State	Approximate equity
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\_\_\_\_\_ \$ \_\_\_\_\_

**INCOME FROM ALL SOURCES**

Yearly Total

Social Security per year	\$ _____
SSI (Supplemental Security Income) per year	\$ _____
Retirement or VA benefits per year	\$ _____
Child Support	\$ _____
Other income, including, e.g., interest, alimony, annuity, or trust distributions	\$ _____

**YEARLY TOTAL OF ALL INCOME**      \$ \_\_\_\_\_

**2. The minor is:**

a. \_\_\_\_\_ NOT a beneficiary of a Trust.

b. \_\_\_\_\_ 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 be made under the Trust and the criteria for payment: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

### 3. BUDGET

I/We plan during the following reporting year to (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 funds for the following purpose:

\_\_\_\_\_

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

\$ \_\_\_\_\_ per month for following purpose: \_\_\_\_\_

\_\_\_\_\_

### 4. ASSET MANAGEMENT PLAN

I/We plan to (initial one)

\_\_\_\_\_ a. maintain the investment plan for the minor's assets as indicated above with no changes.

\_\_\_\_\_ b. reinvest the minor's funds as follows: \_\_\_\_\_

\_\_\_\_\_

**Affidavit**

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 ward within my/our possession, control, or knowledge. This Inventory and Asset Management Plan has been provided to the Guardian of the minor, if any, by first class mail.

Sworn to and subscribed before  
me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Conservator

\_\_\_\_\_  
NOTARY/CLERK OF PROBATE COURT  
My Commission Expires \_\_\_\_\_

\_\_\_\_\_  
Printed Name of Conservator

Sworn to and subscribed before  
me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Co-Conservator, if any

\_\_\_\_\_  
NOTARY/CLERK OF PROBATE COURT  
My Commission Expires \_\_\_\_\_

\_\_\_\_\_  
Printed Name of Conservator