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INSTRUCTIONS FOR INVENTORY INFORMATION FORM

The following questionnaire is designed to help you provide the basic information needed for the Inventory, Appraisal, and List of Claims required by the Texas Probate Code. This consists of a list of all the *probate* assets owned by the Decedent on the date of his or her death, plus a list of claims the Estate has against someone else (e.g., a debt owed to the Decedent – *not* debts owed *by* the Decedent). *Probate Assets* are those which pass under the Will, so they do not include survivorship accounts (e.g., bank accounts that go automatically to a survivor, or P.O.D. accounts) or retirement plans and life insurance policies (unless they are payable to the Decedent’s Estate, or to his or her “personal representative”). For policies and accounts, please provide the account number: I will redact a portion (e.g., “1234567890” becomes “12345XXXXX”) when submitting it to the court. Generally speaking, the more information the better. For personal property (clothing, household furnishings, general stuff), unless you have collectibles or other items that have specific value (like a coin collection, or art), a simple note of “Personal Property located at 111 Main Street, Dallas, Texas 77777” with a general statement of its value (often 15% - 20% of the value of the home) will do.

As always, if you have any questions at all, please call me. Thanks.

INVENTORY INFORMATION FORM

*All information that you provide is confidential and is protected
from forced disclosure by the attorney-client privilege.*

BANK, FINANCIAL INSTITUTION, BROKERAGE ACCOUNTS
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1.	<i>Institution</i>		<i>Owner(s)</i>
	<i>Account Number</i>		<i>Balance</i>
2.	<i>Institution</i>		<i>Owner(s)</i>
	<i>Account Number</i>		<i>Balance</i>
3.	<i>Institution</i>		<i>Owner(s)</i>
	<i>Account Number</i>		<i>Balance</i>
4.	<i>Institution</i>		<i>Owner(s)</i>
	<i>Account Number</i>		<i>Balance</i>
5.	<i>Institution</i>		<i>Owner(s)</i>
	<i>Account Number</i>		<i>Balance</i>
6.	<i>Institution</i>		<i>Owner(s)</i>
	<i>Account Number</i>		<i>Balance</i>
7.	<i>Institution</i>		<i>Owner(s)</i>
	<i>Account Number</i>		<i>Balance</i>
8.	<i>Institution</i>		<i>Owner(s)</i>
	<i>Account Number</i>		<i>Balance</i>

PENSION/IRA/RETIREMENT ACCOUNTS
(ONLY INCLUDE THOSE PAYABLE TO THE ESTATE)

1.		
	<i>Institution</i>	<i>Beneficiary(ies)</i>
	<i>Account Number</i>	<i>Balance</i>
2.		
	<i>Institution</i>	<i>Beneficiary(ies)</i>
	<i>Account Number</i>	<i>Balance</i>
3.		
	<i>Institution</i>	<i>Beneficiary(ies)</i>
	<i>Account Number</i>	<i>Balance</i>
4.		
	<i>Institution</i>	<i>Beneficiary(ies)</i>
	<i>Account Number</i>	<i>Balance</i>

REAL ESTATE

1.			
	<i>Address</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
	<i>Legal Description</i>		
2.			
	<i>Address</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
	<i>Legal Description</i>		
3.			
	<i>Address</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
	<i>Legal Description</i>		
4.			
	<i>Address</i>	<i>Owner(s)</i>	<i>Approx. Value</i>
	<i>Legal Description</i>		

LIFE INSURANCE POLICIES
(ONLY INCLUDE THOSE PAYABLE TO THE ESTATE)

1.	<i>Company</i>	<i>Insured Name</i>	<i>Death Benefit</i>
	<i>Beneficiary(ies)</i>	<i>Policy Number</i>	
2.	<i>Company</i>	<i>Insured Name</i>	<i>Death Benefit</i>
	<i>Beneficiary(ies)</i>	<i>Policy Number</i>	
3.	<i>Company</i>	<i>Insured Name</i>	<i>Death Benefit</i>
	<i>Beneficiary(ies)</i>	<i>Policy Number</i>	
4.	<i>Company</i>	<i>Insured Name</i>	<i>Death Benefit</i>
	<i>Beneficiary(ies)</i>	<i>Policy Number</i>	

BUSINESSES OWNED

1.	<i>Name of Entity</i>	<i>Type of Entity</i>	<i>Value</i>
	<i>Owner(s)</i>	<i>Percentage Owned</i>	
2.	<i>Name of Entity</i>	<i>Type of Entity</i>	<i>Value</i>
	<i>Owner(s)</i>	<i>Percentage Owned</i>	
3.	<i>Name of Entity</i>	<i>Type of Entity</i>	<i>Value</i>
	<i>Owner(s)</i>	<i>Percentage Owned</i>	

CLAIMS OWED TO ESTATE

1.	<i>Nature of Claim</i>	<i>Debtor</i>	<i>Value</i>
2.	<i>Nature of Claim</i>	<i>Debtor</i>	<i>Value</i>
3.	<i>Nature of Claim</i>	<i>Debtor</i>	<i>Value</i>

CARS, TRUCKS, VEHICLES

1.	_____	_____	_____
	<i>Make, Model, Year</i>	<i>Owner(s)</i>	<i>Value</i>

	<i>VIN</i>		
2.	_____	_____	_____
	<i>Make, Model, Year</i>	<i>Owner(s)</i>	<i>Value</i>

	<i>VIN</i>		
3.	_____	_____	_____
	<i>Make, Model, Year</i>	<i>Owner(s)</i>	<i>Value</i>

	<i>VIN</i>		

PERSONAL PROPERTY AND OTHER ASSETS (CONTINUE ON BACK IF NECESSARY)

1.	_____	
	<i>Description</i>	
	_____	_____
	<i>Owner(s)</i>	<i>Value</i>
2.	_____	
	<i>Description</i>	
	_____	_____
	<i>Owner(s)</i>	<i>Value</i>
3.	_____	
	<i>Description</i>	
	_____	_____
	<i>Owner(s)</i>	<i>Value</i>
4.	_____	
	<i>Description</i>	
	_____	_____
	<i>Owner(s)</i>	<i>Value</i>
5.	_____	
	<i>Description</i>	
	_____	_____
	<i>Owner(s)</i>	<i>Value</i>
6.	_____	
	<i>Description</i>	
	_____	_____
	<i>Owner(s)</i>	<i>Value</i>