

Information Sheet for Inventory and Appraisalment

Not later than the 30th day after the date of the guardian of the estate qualifies, unless a longer period is granted by the court, the guardian shall file with the court clerk a single written instrument that contains a verified, full, and detailed inventory of all the ward's property that has come into the guardian's possession or of which the guardian has knowledge. The inventory must:

1. Include all the ward's real property located in this state and all the ward's personal property regardless of where the property is located.
2. Specify which portion of the property is separate property and which property is community property.
3. Specify if the property is owned in common with other persons, and specify the ward's interest in that property.
4. Set out in the inventory the guardian's appraisalment of the fair market value of each item in the inventory on the date of the grant of letters of guardianship,
5. Determine, if the court has appointed an appraiser for the estate, the fair market value of each item in the inventory with the assistance of the appraiser, and set out in the inventory the appraisalment made by the appraiser.

The guardian of the estate shall make and attach to the inventory and appraisalment required by Section 1154.051 a complete list of claims due or owing to the ward. The list of claims must state:

1. The name and, if known, address of each person indebted to the ward; and
2. Regarding each claim, the nature of the debt, whether it is a note, bill, bond, or other written obligation, or whether it is an account or verbal contract,
3. Regarding each claim, the date the debt was incurred,
4. Regarding each claim, the date the debt was or is due,
5. Regarding each claim, the amount of the claim, the rate of interest on the claim, and the period for which the claim bears interest, and
6. Regarding each claim, if any portion of the claim is held in common with others, the interest of the estate in the claim.