

GENERAL INSTRUCTIONS FOR COMPLETION OF INVENTORY FOR ADMINISTRATORS/EXECUTORS

What is an Inventory?

An Inventory provides a “snapshot” of an Estate at the time the Estate is opened. An Inventory is used to state the status of the Estate at the time the (Administrator)(Executor) began to serve. *The figures used to complete the Inventory should represent the property at the time the Estate is opened, not the time that the document is filed.*

When is the Inventory due?

The Inventory is due within 6 months after appointment of the (Administrator)(Executor) to the decedent’s Estate.

What is the Inventory filing fee?

The Fiduciary Compliance Report WITH assets is \$40.00. The Court accepts cash, credit cards, cashier’s checks, or money orders. Make any cashier’s check or money order made out to the Probate Court of Bibb County.

The Fiduciary Compliance Report WITH NO assets is NO FEE.

How do I (the Administrator/Executor) complete the signature portions?

Inventory Form: Sign the signature portion found at the very bottom of the form in front of a Notary or a Probate Clerk. Make sure ALL (Administrators)(Executors) have signed.

Certificate of Mailing: Sign the signature portion below the names and addresses in front of a Notary or a Probate Clerk. Make sure ALL (Administrators)(Executors) have signed. Do not sign anything below the bolded line.

What attachments are necessary?

Attach the bank statement(s) showing the account title(s) and balance(s) from the month in which the estate was opened.

Attach a copy of the Affidavit of Notice to Debtors and Creditors.

Can I mail in my Inventory?

Yes. Make sure the Affidavit and Certificate of Mailing have been notarized before mailing. Send the completed Inventory (pages numbered 1-2) to:

Probate Court of Bibb County
P.O. Box 6518
Macon, Georgia 31208

If mailing, send a cashier’s check or money order made payable to Probate Court of Bibb County within the same envelope.

INVENTORY

TO THE HONORABLE JUDGE OF THE PROBATE COURT OF THIS STATE AND COUNTY:

The following is a true and complete Inventory of the estate, both real and personal, of

_____, Deceased, by _____, (Administrator)(Executor)

	VALUE ON THE DATE
<u>ESTATE ASSET TYPE</u>	<u>LETTERS ISSUED</u>

1. **REAL ESTATE** (include address and county where located)

Parcel One: _____

Parcel Two: _____

Attach supplement page including more real estate parcels if necessary

TOTAL VALUE OF REAL ESTATE

(add value(s) from supplement page(s) to total)

2. **PERSONAL PROPERTY**

A. Bank Accounts (give name of financial institution and account number)

(Including: Checking/Savings/Certificate of Deposit Accounts)

1. _____

2. _____

3. _____

Attach supplement page including more bank accounts if necessary

B. Other Financial Accounts:

(Including: Stocks (number of shares and company), Bonds (face amount), Mutual Funds, and other securities)

1. _____

2. _____

Attach supplement page including more financial accounts if necessary

C. Vehicles (automobiles, trucks, boats, etc.)

1. _____

2. _____

Attach supplement page including more vehicles if necessary

D. Other personal property and personal effects of significant value (describe)

1. _____

2. _____

TOTAL VALUE OF PERSONAL PROPERTY

(add value(s) from supplement page(s) to total)

*Is the estate party in a pending lawsuit? YES NO

*If the estate does not have significant assets and no lawsuit is pending, state the reason why the estate was opened:

SWORN TO and subscribed before me, this

____ day of _____, 20____.

Signature (Administrator)(Executor)

Notary Public or Clerk of Probate Court

Signature (Administrator)(Executor)

IN RE: ESTATE OF _____

CERTIFICATE OF MAILING OF INVENTORY

This is to certify that I (Administrator)(Executor) have this date delivered, by first class mail, in an addressed envelope with sufficient postage, a copy of the foregoing Inventory to the following beneficiaries or heirs who are entitled to receive an Inventory, as provided in O.C.G.A. § 53-7-30:

Name:

Address:

_____	_____
_____	_____
_____	_____
_____	_____

 Signature (Administrator)(Executor)
 Address _____

 Signature (Administrator)(Executor)
 Address _____

SWORN TO and subscribed before me, this _____ day of _____, 20____.

Notary Public or Clerk of Probate Court

ORDER ADMITTING TO RECORD

PROBATE COURT OF BIBB COUNTY

The within and foregoing INVENTORY of the estate of the named decedent is hereby ordered admitted to record.

SO ORDERED on _____.

JUDGE, PROBATE COURT OF BIBB COUNTY, GA

Filed: _____

Affidavit of Notice to Debtors & Creditors
Bond Verified

Clerk: _____

Yes / No Increase Required \$ _____