

PROBATE COURT OF CLAYTON COUNTY

STATE OF GEORGIA

MINOR CONSERVATORSHIP INVENTORY AND ASSET MANAGEMENT PLAN

WARD: _____ ESTATE NO. _____

WARD'S DOB _____ WARD WILL BE 18 ON _____

WARD'S ADDRESS _____

This address is _____ is not _____ a new address

CONSERVATOR(S): _____

CONSERVATOR'S ADDRESS _____

This address is _____ is not _____ a new address

A. INVENTORY OF MINOR'S PROPERTY

REAL PROPERTY

(Indicate if property is jointly owned and with whom)

Description	County	State	Approximate equity
Parcel 1 _____			\$ _____
Parcel 2 _____			\$ _____

If the minor owns any property which is pledged as collateral on a loan, please list the obligor/payee; collateral, if any; whether the loan is joint; the approximate balance, and whether payments are current on said loan: _____

If the property listed above is owned jointly with other individuals, please indicate the minor's percentage of ownership in each property: _____

PERSONAL AND INTANGIBLE PROPERTY

**(Indicate if property is jointly owned and with whom)
Approximate Current Value**

1. Checking/Savings/Money Market/Certificates of Deposit/Liquid Accounts:

Bank/Financial Institution/Broker	Acct. No.	Joint Owner (if any)	
_____			\$ _____
_____			\$ _____
_____			\$ _____

2. Stocks/Bonds/Investments (including retirement and profit-sharing accounts):

a. held by brokers:

Brokerage Firm or Institution	Acct. No.	Joint Owner (if any)	
_____			\$ _____
_____			\$ _____
_____			\$ _____

b. Privately held:

Company/Issuer	No. of Shares	Joint Owner (if any)	
_____			\$ _____
_____			\$ _____

3. Automobiles:

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

4. Certificates of Deposit

Bank/Financial Institution/Broker	Acct. No.	Joint Owner (if any)	
_____			\$ _____
_____			\$ _____
_____			\$ _____

5. Annuities

Payor	Acct. No.	Joint Owner (if any)	
_____			\$ _____

\$ _____
\$ _____

6. Other assets of significant value:

Description Joint owner (if any)
\$ _____

\$ _____
TOTAL VALUE OF PERSONAL AND INTANGIBLE PROPERTY \$ _____

MINOR'S ESTIMATED ANNUAL INCOME FROM ALL SOURCES

Social Security per year Yearly Total
\$ _____

SSI (Supplemental Security Income) per year \$ _____

Income from annuity \$ _____

Interest, dividend, or investment income \$ _____

Other income per year, including,
e.g., alimony, annuity, or trust distributions (payor): _____ \$ _____

Interest, dividend, or investment income \$ _____

YEARLY TOTAL OF ALL INCOME \$ _____

If the Ward is a beneficiary of a Trust, please show the name of the Trust, the Trustee, his/her address, telephone number, and attach an outline showing when and how payments are required to be made under the Trust and the criteria for payment: _____

Note: If no leave to disburse the minor's funds through a budget is sought, skip to **ASSET MANAGEMENT PLAN SECTION**

B. REQUEST FOR PERMISSION TO DISBURSE MINOR'S FUNDS

PARENT'S NAME, ADDRESS AND TELEPHONE NUMBER(S)

Are both parents custodial parents? _____ Yes _____ No (If no, who is _____)

Is mother of child living ? _____ Yes _____ No. Is father of child living? _____ Yes _____ No

CUSTODIAL PARENT'S INCOME FOR BENEFIT OF MINOR

Social Security per year paid for the benefit of the minor \$ _____

Child Support per year received for minor \$ _____

DEBTS AND OTHER LIABILITIES

The ward owes the following debts/liabilities:

Obligor/Payee	Collateral (or list if debt is unsecured)	Solely/Jointly Owed	Approx. Current Balance
_____			\$ _____
_____			\$ _____

Is the minor behind on any debt payment Yes ____ No ____

If yes, payee and amount behind _____

TOTAL DEBTS AND OTHER LIABILITIES OF WARD \$ _____

If child resides with parents, please provide income for both parents from all sources. Also indicate why parents can not adequately support this child.

ESTIMATED AVERAGE ANNUAL EXPENSES OF THE MINOR

Expense/ type of purchase

_____	\$ _____
_____	\$ _____
_____	\$ _____

SUMMARY

- 1. Total projected annual income of minor \$ _____
- 2. Total projected annual Expenses of minor <\$ _____>
- 3. Income less total expenses (positive or negative figure):** \$ _____

Therefore, based upon the income and expenses shown above, the Conservator(s) hereby request(s) leave to disburse from the minor's estate the sum of \$_____ for the support, care, education, health, and welfare of the minor. To the extent that such sum exceeds current income, authority to encroach is hereby requested; to the extent that current income exceeds such sum, the Conservator(s) shall be limited to expend such sum.

(Please be advised this is the amount you are requesting. The Conservator is not authorized to disburse funds until the court approves your request. The court may or may not schedule a hearing in this matter. You will be notified of any hearing date and the decision the court makes at the address on this document.)

C. ASSET MANAGEMENT PLAN

Please describe how you plan to manage the ward's assets, including details regarding sale, refinancing, reallocation, investments, or other actions, if any: _____

Clayton County Probate Court
121 S. McDonough Street Annex Bldg. 3
Jonesboro, GA 30236
770/477-3299
AFFIDAVIT

I/We, _____, Conservator(s) of the

above Ward, 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 ward, if any, by first class mail.

Sworn to and subscribed before
me this ____ day of _____, 20____. _____
Conservator

NOTARY/CLERK OF PROBATE COURT Printed Name
(My notary expires:_____)

Sworn to and subscribed before
me this ____ day of _____, 20____. _____
Co-Conservator, if any

NOTARY/CLERK OF PROBATE COURT Printed Name
(My notary expires:_____)

Clayton County Probate Court
121 S. McDonough Street Annex Bldg. 3
Jonesboro, GA 30236
770/477-3299
July 15, 2005

IN THE PROBATE COURT OF CLAYTON COUNTY

STATE OF GEORGIA

IN RE:)	ESTATE NO. _____
)	
_____,)	ASSET MANAGEMENT PLAN
MINOR)	
)	DOB _____
_____,)	
CONSERVATOR(S))	

ORDER

The Conservator(s) having filed an Asset Management Plan for the above estate, it is hereby ORDERED that the Conservator(s) is/are authorized to disburse from the Minor's estate the sum of \$ _____ per month for the support of the Minor.

IT IS FURTHER ORDERED that said Conservator(s) shall show in the annual return how such funds actually were spent.

IT IS FURTHER ORDERED that to the extent that such sum exceeds, in any month, the current income, authority to encroach is hereby granted; to the extent that current income, in any month, exceeds such sum, the Conservator(s) is/are hereby limited to expending such sum.

SO ORDERED this _____ day of _____, 20_____.

JUDGE PAM FERGUSON
Clayton County Probate Court