

IN THE IOWA DISTRICT COURT FOR POLK COUNTY

IN THE MATTER OF THE) **PROBATE NO.** _____
CONSERVATORSHIP OF:)
)
) **INITIAL REPORT OF CONSERVATOR**
_____) **AND INVENTORY**
)

The undersigned duly appointed and qualified conservator states as follows:

1. This Ward's real and personal property as of the date the conservator was appointed and the valuation of each item is itemized on the schedules attached hereto, and a summary of such schedules is as follows:

Conservatorship Assets

(Attach Descriptions)

- A. Real Estate: \$ _____
- B. Stocks and Bonds: \$ _____
- C. Mortgages, Notes, Deposits and Cash \$ _____
- D. Life Insurance \$ _____
- E. Jointly Owned Property \$ _____
- F. Miscellaneous Property \$ _____

2. The Ward resides at (street, city, state, zip): _____

(Check One)

- A. The ward has no Guardian.
 - B. The name of the ward's Guardian is: _____
and whose address is (street, city, state, zip): _____
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3. Conservator (has) (has not) established a (non-interest bearing) (interest bearing) conservatorship checking account at (Name of Financial Institute) _____ located at (street, city, state, zip) _____.

4. Conservatorship savings account (has) (has not) been established at (Name of Financial Institute) _____ located at (street, city, state, zip) _____.

5. Other assets (have) (have not) been changed into conservatorship name.

(Note: Bank statements, checks, receipts, stubs and other items evidencing receipt of funds and payment must be available to the court on demand.)

6. The Ward's sources of income and monthly or annual amounts are: _____

I certify under penalty of perjury and pursuant to the laws of the State of Iowa that the preceding is true and correct.

Date: _____

Conservator Signature

Printed Name:

Address (street, city, state, zip):

Telephone Number(s):