

Rule 7.11 — Form 3: Initial Report of Conservator and Inventory

 *If filing electronically, you must provide any protected information in full on form 6, according to Division VI of Chapter 16 of the Iowa Court Rules.*

 *If filing in paper, you may use form 6 to provide any protected information in full.*

In the Iowa District Court for _____ County

In the Matter of the conservatorship of:

Probate no. _____

Initial Report of Conservator and Inventory

Full name: first, middle, last

If the Ward is a minor, use initials only

Ward.

The undersigned duly appointed and qualified Conservator states as follows:

1. The Ward's real and personal property as of the date Conservator was appointed, and the valuation of each item, is itemized on the attached schedules. A summary of the schedules follows:

Conservatorship assets <i>Attach descriptions</i>	Total value
A. Real estate	\$ _____
B. Stocks and bonds	\$ _____
C. Mortgages, notes, deposits, and cash	\$ _____
D. Life insurance	\$ _____
E. Jointly owned property	\$ _____
F. Miscellaneous property	\$ _____
Total of all schedules	\$ _____

2. The Ward resides at: _____
Street address
City
State
ZIP code

and *check one*

- A. does not have a Guardian.
 B. has a natural Guardian. *If you check B, you must fill in the following information.*

(1) The name and residency of the natural Guardian:

Full name: first, middle, last

Street address
City
State
ZIP code

- C. has a court-appointed Guardian. *If you check C, you must fill in the following information.*

(1) The name and residency of the court-appointed Guardian:

Full name: first, middle, last

Street address
City
State
ZIP code

3. The Conservator: has has not
established an interest-bearing non-interest-bearing

conservatorship checking account at _____
Name of financial institution

located at _____
Street address City State ZIP code

The (partial) account number is: _____

4. A conservatorship savings account : has has not

been established at _____
Name of financial institution

located at _____
Street address City State ZIP code

The (partial) account number is: _____

5. Other assets: have have not
been changed into conservatorship's name.

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

7. Oath and Signature

I, _____, have read this Initial Report and Inventory, and I certify
Print Conservator's name

under penalty of perjury and pursuant to the laws of the State of Iowa that the information I
have provided in this Initial Report and Inventory is true and correct.

_____, 20_____
*Month Day Year Conservator's signature**

Mailing address City State ZIP code

(_____) _____
Phone number Email address Additional email address, if applicable

* Whether filing electronically or in paper, you must *handwrite* your signature on this form. If you are filing electronically, scan the form after signing it and then file electronically.

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