

<b>In the Iowa District Court for _____ County</b>	
<b>In the Matter of the Conservatorship of:</b>  _____ <i>Full name: first, middle, last</i> <i>If the protected person is a minor, use initials only</i> <b>Protected Person.</b>	Probate no. _____  <b style="text-align: center;">Inventory of Protected Person</b>  <div style="text-align: right;">Iowa Code § 633.670(2)</div>

*\*Copies of this inventory must be provided to the Protected Person, the Protected Person’s attorney and court advisor, if any, and others as the court directs.*

Conservator states as follows:

1. Protected Person’s real and personal property as of the date Conservator was appointed, and the valuation of each item, is listed in Attachment “A.” A summary of Attachment “A” follows:

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

2. A conservatorship checking account: ( has  has not) been established.

The checking account is ( interest-bearing  non-interest-bearing).

The conservatorship checking is located at:

\_\_\_\_\_  
*Name of financial institution*

\_\_\_\_\_  
*Street address*

\_\_\_\_\_  
*City*

\_\_\_\_\_  
*State*

\_\_\_\_\_  
*ZIP code*

The (partial) account number is: \_\_\_\_\_  
*Last 4 digits of account number.*

If you need assistance to participate in court due to a disability, call the disability coordinator at \_\_\_\_\_. Persons who are hearing or speech impaired may call Relay Iowa TTY (1-800-735-2942). **Disability coordinators cannot provide legal advice.**

3. A conservatorship savings account: ( has  has not) been established.

The conservatorship savings account is located at:

\_\_\_\_\_  
Name of financial institution

\_\_\_\_\_  
Street address City State ZIP code

The (partial) account number is: \_\_\_\_\_  
Last 4 digits of account number.

5. Other assets:  have  have not

been changed into conservatorship's name. If yes, please identify:

Asset	Value
_____	\$ _____.
_____	\$ _____.
_____	\$ _____.
_____	\$ _____.
_____	\$ _____.
_____	\$ _____.
_____	\$ _____.
_____	\$ _____.

6. Oath and signature

I, \_\_\_\_\_, have read this inventory, and I certify under penalty  
*Print Conservator's name*  
of perjury and pursuant to the laws of the State of Iowa that the information I have  
provided in this inventory is believed to be complete and accurate as far as  
information permits.

\_\_\_\_\_, 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.