

Sonja Rankin's

Probate - Estate Inventory List

(Open on a computer; this was not designed for mobile phones and can look distorted)

Maintaining a detailed estate inventory is crucial for the probate process. Below is a structured inventory list to help you gather and organize the necessary information about the deceased's assets.

Estate Inventory List

1. Real Estate Holdings

- **Property Address:** _____
- **Type of Property** (e.g., residential, commercial): _____
- **Deed Information:** _____
- **Current Market Value:** _____
- **Mortgage Balance:** _____
- **Property Tax Information:** _____
- **Occupancy Status** (Vacant, Tenant-Occupied, Owner-Occupied) _____

- **Secondary Property**
- **Property Address:** _____
- **Type of Property** (e.g., residential, commercial): _____
- **Deed Information:** _____
- **Current Market Value:** _____
- **Mortgage Balance:** _____
- **Property Tax Information:** _____

2. Personal Property

- **Vehicles:**
 - **Make & Model:** _____
 - **VIN:** _____
 - **Current Market Value:** _____
- **Jewelry:**

- Description: _____
 - Estimated Value: _____

 - Artwork/Antiques:
 - Description: _____
 - Estimated Value: _____
 - Furniture:
 - Description: _____
 - Estimated Value: _____
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3. Financial Accounts

- Bank Account #1 :
 - Bank Name: _____
 - Account Type: _____
 - Account Balance: _____
 - Bank Account #2:
 - Bank Name: _____
 - Account Type: _____
 - Account Balance: _____

 - Investment Accounts:
 - Firm Name: _____
 - Account Type: _____
 - Current Value: _____
 - Retirement Accounts:
 - Account Type: _____
 - Current Value: _____
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4. Business Interests

- Business Name: _____
- Ownership Percentage: _____
- Current Valuation: _____
- Partnership/Operating Agreements: _____

5. Debts and Liabilities

- **Mortgage Details:**
 - **Lender Name:** _____
 - **Outstanding Balance:** _____
 - **Credit Card Accounts:**
 - **Card Issuer:** _____
 - **Outstanding Balance:** _____
 - **Other Loans:**
 - **Creditor Name:** _____
 - **Outstanding Balance:** _____
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6. Insurance Policies

- **Life Insurance:**
 - **Provider:** _____
 - **Policy Number:** _____
 - **Current Value:** _____
 - **Health Insurance:**
 - **Provider:** _____
 - **Other Policies:** _____
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7. Estate Planning Documents

- **Last Will and Testament:** _____
 - **Trust Documents:** _____
 - **Powers of Attorney:** _____
 - **Healthcare Directives:** _____
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8. Tax Documents

- **Recent Tax Returns:** _____
- **Pending Tax Issues:** _____

9. Miscellaneous Items

- Safe Deposit Box: _____
- Digital Assets: _____
- Passwords: _____
- Access Keys: _____
- Memberships/Subscriptions: _____

Final Notes

- Total Estimated Value of Estate: _____
- Prepared by: _____
- Date: _____

Provided by Sonja Rankin, a Certified Probate Specialist

Disclaimer: This document is intended as an organizational tool to assist you in gathering estate information. I am a Real Estate Agent and Certified Probate Specialist, not an attorney or CPA. The content provided here should not be interpreted as legal or tax advice. For specific guidance regarding probate laws or financial implications, please rely on the counsel of your attorney and financial advisors. Resource information: