

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address):		FOR COURT USE ONLY						
TELEPHONE NO.: <input type="text"/> E-MAIL ADDRESS (Optional): <input type="text"/> ATTORNEY FOR (Name): <input type="text"/>								
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF</b> STREET ADDRESS: <input type="text"/> MAILING ADDRESS: <input type="text"/> CITY AND ZIP CODE: <input type="text"/> BRANCH NAME: <input type="text"/>								
ESTATE OF (Name): <input type="text"/>  <input type="checkbox"/> DECEDENT <input type="checkbox"/> CONSERVATEE <input type="checkbox"/> MINOR								
<b>INVENTORY AND APPRAISAL</b> <table> <tr> <td><input type="checkbox"/> Partial No.:</td> <td><input type="checkbox"/> Corrected</td> </tr> <tr> <td><input type="checkbox"/> Final</td> <td><input type="checkbox"/> Reappraisal for Sale</td> </tr> <tr> <td><input type="checkbox"/> Supplemental</td> <td><input type="checkbox"/> Property Tax Certificate</td> </tr> </table>		<input type="checkbox"/> Partial No.:	<input type="checkbox"/> Corrected	<input type="checkbox"/> Final	<input type="checkbox"/> Reappraisal for Sale	<input type="checkbox"/> Supplemental	<input type="checkbox"/> Property Tax Certificate	CASE NUMBER: <input type="text"/>  Date of Death of Decedent or of Appointment of Guardian or Conservator: <input type="text"/>
<input type="checkbox"/> Partial No.:	<input type="checkbox"/> Corrected							
<input type="checkbox"/> Final	<input type="checkbox"/> Reappraisal for Sale							
<input type="checkbox"/> Supplemental	<input type="checkbox"/> Property Tax Certificate							

### APPRAISALS

1. Total appraisal by representative, guardian, or conservator (Attachment 1): \$
2. Total appraisal by referee (Attachment 2): \$

**TOTAL:** \$

### DECLARATION OF REPRESENTATIVE, GUARDIAN, CONSERVATOR, OR SMALL ESTATE CLAIMANT

3. Attachments 1 and 2 together with all prior inventories filed contain a true statement of  
 all    a portion   of the estate that has come to my knowledge or possession, including particularly all money and all just claims the estate has against me. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 1.
4.  No probate referee is required  by order of the court dated (specify):
5. **Property tax certificate.** I certify that the requirements of Revenue and Taxation Code section 480
  - a.  are not applicable because the decedent owned no real property in California at the time of death.
  - b.  have been satisfied by the filing of a change of ownership statement with the county recorder or assessor of each county in California in which the decedent owned property at the time of death.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:



(TYPE OR PRINT NAME; INCLUDE TITLE IF CORPORATE OFFICER)

(SIGNATURE)

### STATEMENT ABOUT THE BOND

(Complete in all cases. Must be signed by attorney for fiduciary, or by fiduciary without an attorney.)

6.  Bond is waived, or the sole fiduciary is a corporate fiduciary or an exempt government agency.
7.  Bond filed in the amount of: \$  Sufficient  Insufficient
8.  Receipts for: \$  have been filed with the court for deposits in a blocked account at (specify institution and location):

Date:



(TYPE OR PRINT NAME)

(SIGNATURE OF ATTORNEY OR PARTY WITHOUT ATTORNEY)

ESTATE OF (Name):				CASE NUMBER:
<input type="checkbox"/> DECEDENT		<input type="checkbox"/> CONSERVATEE	<input type="checkbox"/> MINOR	

### DECLARATION OF PROBATE REFEREE

9. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 2.
10. A true account of my commission and expenses actually and necessarily incurred pursuant to my appointment is:

Statutory commission: \$

Expenses (specify): \$

**TOTAL:** \$

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

(TYPE OR PRINT NAME)

(SIGNATURE OF REFEREE)

### INSTRUCTIONS

(See Probate Code sections 2610-2616, 8801, 8804, 8852, 8905, 8960, 8961, and 8963 for additional instructions.)

1. See Probate Code section 8850 for items to be included in the inventory.
2. If the minor or conservatee is or has been during the guardianship or conservatorship confined in a state hospital under the jurisdiction of the State Department of Mental Health or the State Department of Developmental Services, mail a copy to the director of the appropriate department in Sacramento. (Prob. Code, § 2611.)
3. The representative, guardian, conservator, or small estate claimant shall list on Attachment 1 and appraise as of the date of death of the decedent or the date of appointment of the guardian or conservator, at fair market value, moneys, currency, cash items, bank accounts and amounts on deposit with each financial institution (as defined in Probate Code section 40), and the proceeds of life and accident insurance policies and retirement plans payable upon death in lump sum amounts to the estate, except items whose fair market value is, in the opinion of the representative, an amount different from the ostensible value or specified amount.
4. The representative, guardian, conservator, or small estate claimant shall list in Attachment 2 all other assets of the estate which shall be appraised by the referee.
5. If joint tenancy and other assets are listed for appraisal purposes only and not as part of the probate estate, they must be separately listed on additional attachments and their value excluded from the total valuation of Attachments 1 and 2.
6. Each attachment should conform to the format approved by the Judicial Council. (See *Inventory and Appraisal Attachment* (form DE-161/GC-041) and Cal. Rules of Court, rules 2.100—2.119.)