

**PROBATE COURT OF HOUSTON COUNTY  
STATE OF GEORGIA**

**MINOR CONSERVATORSHIP INVENTORY  
AND ASSET MANAGEMENT PLAN SHORT FORM**

MINOR: \_\_\_\_\_

ESTATE NO. \_\_\_\_\_

CONSERVATOR(S): \_\_\_\_\_

**A. INVENTORY**

**Savings Accounts**

Financial Institution	Account Name	Account Number	Approximate Value
			\$

**Checking Accounts**

Financial Institution	Account Name	Account Number	Approximate Value
			\$

**Certificates on Deposit**

Financial Institution	Account Name	Account/CD Number	Approximate Value
			\$

**Stocks, Bonds and other securities**

Type	Account Name	Account # or # of Shares	Approximate Value
			\$

**TOTAL** \$ \_\_\_\_\_

**B. ESTIMATED ANNUAL INCOME FROM ALL SOURCES**

including Interest, dividend, or investment income \$ \_\_\_\_\_

**C. BUDGET**

I/We plan during the following reporting year (initial one)

- \_\_\_\_\_ a. to disburse neither principal or interest from the minor's estate
- \_\_\_\_\_ b. to disburse the **interest earned** on the minor's estate for the following purposes: \_\_\_\_\_

\_\_\_\_\_

- \_\_\_\_\_ c. **regardless** of interest earned, to disburse from the minor's estate the sum of \$ \_\_\_\_\_ per month for the following purposes: \_\_\_\_\_

\_\_\_\_\_. Further, I/We receive \$ \_\_\_\_\_ per year in Social

Security benefits for the minor, and \$ \_\_\_\_\_ per year in child support for the minor. (complete only if option "c" is initialed) Further, the Minor (initial one)

\_\_\_\_\_ I. is not a beneficiary of a Trust

\_\_\_\_\_ II. is a beneficiary of a Trust, and the following is the name of the Trust, the Trustee, his/her address, telephone number, and attach an outline showing when and how payments are required to made under the Trust and the criteria for payment: \_\_\_\_\_

**D. ASSET MANAGEMENT PLAN**

I/We plan to (initial one)

\_\_\_\_\_ a. maintain the investment plan for the minor's assets as indicated in the above Inventory

\_\_\_\_\_ b. reinvest the minor's funds as follows: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**E. BOND**

Amount of Bond Posted Previously \$ \_\_\_\_\_

Amount of Bond Posted Herewith \$ \_\_\_\_\_

**F. AFFIDAVIT**

I/We, \_\_\_\_\_, Conservator(s) of the above minor, do swear that the foregoing Inventory and Asset Management Plan contains a just, true, and complete inventory and budget of all property belonging to said minor within my/our possession, control, or knowledge, in addition to the financial information of the parent(s), if provided. This Inventory and Asset Management Plan has been provided to the Guardian of the ward, if any, by first class mail.

Sworn to and subscribed before  
me this \_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_.

\_\_\_\_\_  
Conservator

\_\_\_\_\_  
NOTARY/CLERK OF PROBATE COURT

\_\_\_\_\_  
Printed Name

Sworn to and subscribed before  
me this \_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_.

\_\_\_\_\_  
Co-Conservator, if any

\_\_\_\_\_  
NOTARY/CLERK OF PROBATE COURT

\_\_\_\_\_  
Printed Name