

**CIRCUIT COURT OF ST. LOUIS COUNTY
PROBATE DIVISION**

**Checklist of Requirements for
Filing Inventory and Appraisal**

Document Category – Inventory and/or Appraisal

Document Type – Regular - Inventory and Appraisal (other)

Document Type – Amended or Corrected – Inventory – Amended

NOTE: Unless specifically stated, all documents to be filed with the court (designated in bold italics) shall be submitted as a separate document – not an attachment.

- Must be filed within 30 days from the date letters are granted unless longer time is granted. The ***inventory*** should not be filed before letters have been granted.

- Requests for additional time*** to file the inventory must contain a reason and a suggested due date of not more than 30 days per request. See Local Court Rule 72.2, item 1, Requests for Extension of Time.

- Must contain a detailed description as set out in the sections of the court form of all property of a decedent; disabled person or minor including:
 - Exempt property
 - Fair market values of all real and personal property as of the date of death of decedent or date conservator appointed.
 - Statement of all encumbrances, liens or other charges on any item.

- Must be electronically produced using the Court’s approved form.

- Real Property:
 - Legal description as it appears on deed, including Plat book and page numbers, and street address.
 - Decedents – Missouri real estate only:
 - Disabled Persons or Minors – All real estate including non-Missouri.
 - Mortgages or liens – list any mortgage or lien
 - May use County Assessor value; any other value must be supported by qualified opinion, i.e. ***Appraisal; Real estate agent’s market analysis.***

- Personal Property – Furniture, Household Goods and Wearing Apparel
 - Detailed listing or ***appraisal*** of items not required unless specifically bequeathed.

- Personal Property – Corporate Stocks and Bonds
 - Number of shares, Company names, Class of stock, Fair market value as of date of death or date conservator appointed
 - Indicate whether shares are:
 - Sold on securities exchange, Sold over the counter, or Closely held
 - Brokerage Accounts:
 - Account number
 - List of stocks and bonds or **attach brokerage statement** detailing investments.

- Personal Property – Bank Accounts, Insurance, Money
 - Bank Accounts: Name of bank; Account numbers; Account balances
 - Insurance:
 - Name of insurance company; Policy number, Face value; Name of insured; Amount of payable benefits; Cash surrender value (for disabled persons or minors); and Beneficiaries (for disabled persons or minors)

- Personal Property – Judgments, Proceeds of Lawsuits, Settlements, and Unliquidated claims
 - Nature of the claim and date of loss;
 - Cause No.; Court where judgment rendered; Amount recovered
 - Copy of signed Judgment or Settlement Agreement is required.*** In the case of confidential settlements, a copy of the settlement must be submitted to the legal department for in-camera review
 - Unliquidated claims may be listed with value “unknown”

- Personal Property – All Other Personal Property Including Proportionate Shares in Any Partnership
 - Vehicles: Year; Manufacturer and Model; VIN number
 - Partnership Inventories
 - Ownership percentage with a value
 - Note 473.220 RSMo re: partnership inventories

- Personal Property – Jointly Held Property - Conservatorships
 - Full value and description of all jointly-held property

- Personal Property – Income Information – Conservatorships
 - Statement of all periodic monthly income benefits. Representative Payees must be identified.
 - INCOME SHOULD NOT BE INCLUDED IN TOTAL VALUE**

- Total Values:
 - Personal Property – totals of all sections under Personal Property except Income Information on Conservatorships.
 - Real Estate - total value of all real estate
 - All Property – values of personal property and real estate except Income Information.

- Property Possessed But Not Owned by Decedent, Disabled Person or Minor
 - List of property
 - Statement of personal representative or conservator as to its ownership

- Appraisers Employed by Personal Representative or Conservator
 - Name and Address of Appraiser
 - List assets appraised

- Affidavit of Personal Representative or Conservator - Refer to Local Court Rule 72.2, Item g, Verified Documents and Affidavits.
 - Must be signed before notary public
 - Must be signed by all fiduciaries

ATTACHMENTS TO INVENTORIES:

- Real estate appraisals* should be scanned and e-filed as a **separate** document and submitted as an **attachment** to the Inventory.
- Copies of *account statements, schedules, spreadsheets, or other supporting documents* may be scanned and filed as a part of the Inventory, subject to the e-filing file size limitations.

ITEM NO.	BANK ACCOUNTS, INSURANCE, MONEY Bank accounts: list names of banks, account numbers, and account balances. Insurance: list names of insurance companies, policy numbers, face values, name of person insured and amount of benefits payable. For disabled persons or minors list cash surrender value and any beneficiaries	VALUE	
		\$	
ITEM NO.	JUDGMENTS AND PROCEEDS OF LAWSUITS Specifically indicate the Cause No., the court in which it was rendered, and the amount recovered on behalf of the decedent or disabled person or minor. A copy of the Judgment or Settlement Agreement signed by the judge must be attached.	VALUE	
		\$	

ITEM NO.	ALL OTHER PERSONAL PROPERTY OWNED BY DECEDENT, DISABLED PERSON OR MINOR, INCLUDING PROPORTIONATE SHARES IN ANY PARTNERSHIP Describe vehicles fully, listing year, name of manufacturer, model, and vehicle identification number. No detailed list of partnership assets is required but the ownership percentage of the partnership should be included, with a value. (see 473.220 RSMo. re: partnership inventories)	VALUE	
		\$	
ITEM NO.	JOINTLY HELD PROPERTY – CONSERVATORSHIPS The <u>full</u> value and description of all jointly-held property of the disabled person or minor must be included.	VALUE	
		\$	
ITEM NO.	INCOME INFORMATION - CONSERVATORSHIPS Include a statement of all periodic monthly income or benefits payable to the disabled person or minor. Income should not be included in total.	VALUE	
		\$	
	Total Value of Personal Property	\$	

RECAPITULATION OF PROPERTY

		VALUE
Furniture, household goods, wearing apparel	\$	
Corporate Stocks and Bonds		
Notes, other debts owed to the decedent, disabled person or minor		
Bank accounts, insurance, money		
All other personal property, including proportionate share in any partnership		
TOTAL VALUE PERSONAL PROPERTY	\$	
TOTAL VALUE REAL ESTATE	\$	
TOTAL VALUE ALL PROPERTY	\$	
PROPERTY POSSESSED BUT NOT OWNED BY THE DECEDENT AT DEATH OR BY DISABLED PERSON OR MINOR.		
List such property, together with a statement as to the knowledge of the personal representative or conservator as to its ownership.		
TOTAL VALUE	\$	

APPRAISERS EMPLOYED BY PERSONAL REPRESENTATIVE OR CONSERVATOR

The following qualified and disinterested appraisers were employed to assist the personal representative or conservator in ascertaining the fair market value of assets, the value of which were subject to reasonable doubt.

NAME AND ADDRESS OF APPRAISER

ASSETS APPRAISED

AFFIDAVIT OF PERSONAL REPRESENTATIVE OR CONSERVATOR

_____, personal representative/conservator, herein states on oath or affirmation that the annexed document is a full inventory and description of all the property of _____, decedent, disabled person or minor which has come into the possession or knowledge of the undersigned, and of the property in the possession of the decedent at death or of the disabled person or minor, as far as the undersigned knows and an appraisal of all property subject to appraisal.

It is further stated under oath or affirmation that the undersigned is not and was not at time of decedent’s death in debt or bound in any contract to the decedent, disabled person or minor except as stated in the inventory and appraisal.

Personal Representative/Conservator’s Signature

Personal Representative/Conservator’s Signature

Personal Representative/Conservator’s Name (Typed)

Personal Representative/Conservator’s Name (Typed)

Street Address

Street Address

City State Zip Code

City State Zip Code

Telephone No.

Telephone No.

Subscribed and sworn to before me this _____ day of _____, 20_____.

(Notary Seal)

Notary Public

Notary Commission expires:_____