

SAMPLE INVENTORY AND APPRAISMENT

The undersigned does hereby state that (s)he is a qualified and disinterested person appointed by the personal representative of the estate to appraise the properties set forth in the attached inventory, and does hereby certify that the values set forth therein are the full and true fair market values of said properties as of the date of decedent's death, according to his (her) best knowledge and belief.

Dated: _____

Dated: _____

(Signature of Appraiser)

(Signature of Appraiser)

Appraiser's Name

Appraiser's Name

Address

Address

Items Appraised

Items Appraised

Schedule	description		fair market value
A.	REAL ESTATE	\$	_____
B.	STOCKS AND BONDS	\$	_____
C.	MORTGAGES, NOTES, AND CASH	\$	_____
D.	LIFE INSURANCE & ANNUITIES	\$	_____
E.	JOINTLY OWNED PROPERTY	\$	_____
F.	OTHER MISC. PROPERTY	\$	_____
G.	TRANSFERS DURING DECEDENT'S LIFE	\$	_____
H.	POWERS OF APPOINTMENT	\$	_____
	TOTAL VALUE OF DECEDENT'S PROPERTY	\$	_____

Estate of _____

SCHEDULE "A" – REAL ESTATE

If jointly held use Schedule E. If real estate has been transferred within three (3) years of death, or the transfer is to take effect at or after death, use Schedule G.

Item #	description	fair market value
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Total of Schedule A - Also post to page 2 of this report \$ _____

Estate of _____

SCHEDULE "B" – STOCKS AND BONDS

Give complete description including face amount of bonds, date of issue if series A-E U.S. Bonds or Freedom Shares, certificate numbers , number of shares, and par value where needed for identification. If jointly owned use Schedule E.

Item #	description	fair market value
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Total Schedule B - Also post to page 2 of this report \$ _____

Estate of _____

SCHEDULE "C" – MORTGAGES, NOTES, & CASH

Give complete description of each mortgage, note, or cash including bank accounts , accounts with credit unions, and saving and loan institutions.
If held jointly use Schedule E.

Item #	Description	fair market value
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Total Schedule C - Also post to page 2 of this report

\$ _____

Estate of _____

SCHEDULE "D" – LIFE INSURANCE & ANNUITIES

List all policies payable because of death of the decedent including life insurance and commercial annuities. Proceeds from policies owned by the deceased on the life of another are reportable on Schedule F.

Item #	Description	Amount reportable
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Total Schedule D - Also post to page 2 of this report \$ _____

Estate of _____

SCHEDULE "E" – JOINTLY OWNED PROPERTY

List all jointly owned property including Real Estate, bank accounts, U.S. bonds, etc. List name of surviving joint tenant immediately above each item listed or group of items as appropriate.

Item #	description	fair market value
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Total Schedule E - Also post to page 2 of this report

\$ _____

Estate of _____

SCHEDULE "F" – OTHER MISCELLANEOUS PROPERTY

List all property not held jointly which is not reported elsewhere, including autos, jewelry, collections, furniture, insurance on the life of another person, and non-commercial annuities

Item#	description	fair market value
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Total schedule F - Also post to page 2 of this report

\$ _____

Estate of _____

SCHEDULE "G" – TRANSFERS DURING DECEDENT'S LIFE

List all transfers within three (3) years of death, or to take effect at or after death for less than adequate consideration, including stocks and bonds payable on death. See Sections 2035(a), 2036, 2037 or 2038 Internal Revenue Code.

Item#	description	fair market value
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Total schedule G - Also post to page 2 of this report \$ _____

Estate of _____

SCHEDULE "H" – POWERS OF APPOINTMENT

List all property over which decedent possessed a general power of appointment at the time of death (one exercisable in favor of the decedent, his estate, his creditors, or the creditors of his estate). See Section 2041 Internal Revenue Code.

Item#	description	fair market value
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Total schedule H - Also post to page 2 of this report

\$ _____