

STATE OF MINNESOTA

COUNTY OF _____

JUDICIAL DISTRICT
DISTRICT COURT
PROBATE DIVISION

Court File No. _____

Estate of _____,
Decedent

INVENTORY
☐ ORIGINAL
☐ AMENDED
☐ SUPPLEMENTAL

Date of Death: _____

_____, the Personal Representative
of the Estate, states:

1. The following is a true and correct inventory at date of death values of all the property of the Estate, both real and personal, which has come into my possession as Personal Representative. If an appraisal of any asset has been made, the name and address of each appraiser used is included. After diligent search and inquiry concerning the assets of the Estate, the following is a list of the Estate assets by category:

SCHEDULE		VALUE
Schedule A:	Real Estate	\$
Schedule B:	Stocks, Bonds, and Other Securities	\$
Schedule C:	Bank Accounts, Mortgages, Contracts for Deed, Notes and Cash	\$
Schedule D:	Other Personal Property	\$
SUBTOTAL		\$
Less Schedule E:	Mortgages and Liens	\$
TOTAL		\$

2. A copy of this Inventory, including all schedules, has been mailed to the surviving spouse, if any, and to all residuary distributees of the Decedent and to interested persons and creditors who have requested a copy of the Inventory.

Under penalties for perjury, I declare or affirm that I have read the Inventory and I know or believe its representations are true and complete.

Dated: _____

Personal Representative

Attorney for Personal Representative

Name _____
Firm _____
Street _____
City, State, ZIP _____
Attorney License No: _____
Telephone: _____
FAX: _____
Email: _____

GENERAL INSTRUCTIONS for all Schedules.

1. Values reported should be as of date of death.
2. The appointment of an appraiser is not always necessary.
3. Each asset of a Schedule is to be given its own "Item Number."
4. DO NOT list any joint tenancy property unless the Decedent did not intend to create a true joint tenancy, but rather created for convenience a nominal joint tenancy which is subject to probate. Joint tenancy with right of survivorship property listed in this inventory may be converted to probate property with the consent of the surviving joint tenant(s).
5. List the gross fair market value of each item without subtracting for mortgages or liens.
6. List all mortgages and liens for which decedent was liable on Schedule E.
7. Blank schedules need not be attached.

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SCHEDULE A: REAL ESTATE

INSTRUCTIONS for Schedule A:

1. Include both the legal description and the street address. If rural property also include acreage.
2. For Contracts for Deed: If Decedent owned a Vendor/Seller's interest describe the land on Schedule A, valuing it at zero and show the remaining contract balance on Schedule C. If Decedent owned a Vendee/Buyer's interest, describe the property on Schedule A valuing it at its fair market value.
3. County Assessor's market value can be obtained from the County Assessor or department of taxation.
4. List only Minnesota real estate. DO NOT list real estate located in other states.

Item Number	Description of Property	County Assessor's Market Value	Fair Market Value
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1. Homestead in the County of _____:

2. Other Real Estate:

	Schedule A: Real Estate	TOTAL	
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SCHEDULE B: STOCKS, BONDS AND OTHER SECURITIES

INSTRUCTIONS for Schedule B:

1. Specify face value of bonds, number of shares of stock, stock certificate number and CUSIP number, if available.
2. List each bond issue, stock, or certificate separately.

Item Number	Description of Property	Unit Value	Fair Market Value
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1

2

3

4

	Schedule B: Stocks, Bonds and Other Securities	TOTAL	
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INSTRUCTIONS for Schedule C:

1. List Vendor/Seller's interest in Contract for Deed on this Schedule. Also include the date of the contract, name of Vendee/Buyer, interest rate and unpaid balance at date of death, and accrued interest, if any.
2. List Mortgages owned by Decedent as assets, NOT mortgages for which Decedent is liable or mortgages secured by property in the Estate.

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SCHEDULE D: OTHER PERSONAL PROPERTY**INSTRUCTIONS for Schedule D:**

1. List on this schedule, any personal property owned by Decedent and not reported on other schedules.
Examples of property to be listed on this schedule include: refunds, wearing apparel, household goods, automobiles, furniture, business interests, and insurance payable to the Estate.
2. Where appropriate, specify the location of the property.
3. Use actual value or specify if asset has no pecuniary value.
4. DO NOT list non-probate property.

Item Number	Description of Personal Property	Fair Market Value
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1

2

3

4

	Schedule D: Other Property	TOTAL	
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SCHEDULE E: MORTGAGES AND LIENS**INSTRUCTIONS for Schedule E:**

1. Show any mortgages and liens secured by property in the Estate. Detail the date of the installment, names of the parties, interest rate, payment terms, and any other relevant data. Indicate the Schedule and Item Number of the secured property from prior schedule. The remaining balance of Contracts for Deed in which Decedent was the Vendee/Buyer or was the mortgage debtor should be listed on this Schedule. Also include interest and taxes due at date of death.

Item Number	Description of Mortgage or Lien	Asset Secured (Schedule and Item Number)	Balance as of Date of Death
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1

2

3

4

	Schedule E: Mortgages and Liens	TOTAL	
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