

Inventory Form

Note: You can save this form on your computer at any time during completion, to do so, click on the logo representing a floppy disk on the toolbar in acrobat reader, or click in "File" then "Save as" in the acrobat reader's menu.

PUBLIC GUARDIAN'S REF

PG/

DATE OF APPOINTMENT

(As per Court Order. If you had interim financial powers, give the date of the Interim Order)

Adult

TITLE

SURNAME

FORENAME

CURRENT ADDRESS

Guardian

TITLE

SURNAME

FORENAME

EMAIL

TELEPHONE NUMBER

If more than one Financial Guardian has been appointed, please tell us who will be the primary point of contact. This will be helpful, particularly if clarification or further information is needed by this office.

ARE YOU THE PRIMARY
POINT OF CONTACT?

YES

NO

Joint Guardian (If Applicable)

TITLE:

SURNAME:

FORENAME:

EMAIL:

TELEPHONE NUMBER:

ARE YOU THE PRIMARY
POINT OF CONTACT?

YES

NO

Joint Guardian (If Applicable)

TITLE:

SURNAME:

FORENAME:

EMAIL:

TELEPHONE NUMBER:

ARE YOU THE PRIMARY
POINT OF CONTACT?

YES

NO

Section 1 - Heritable Property

(Please read Guidance Note 2.1)

(Include share of any property owned by the adult)

DETAILS	ESTIMATED VALUATION

TOTAL VALUE HERITABLE ASSETS £

Section 2 - Moveable Assets

(Please read Guidance Note 2.2)

Please note the balance/value of each asset should be entered as at the **date of appointment** and documentary evidence provided for each item. (The date of appointment is the date on which the Sheriff appointed you as financial guardian.)

If an account is overdrawn, please add a minus sign before the balance e.g. -1000.00

SECTION 2A - CASH, BANK AND BUILDING SOCIETY ACCOUNTS

FUND HOLDER	SORT CODE	ACCOUNT TYPE	ACCOUNT NUMBER	BALANCE

TOTAL CASH, BANK AND BUILDING SOCIETY ACCOUNTS £

SECTION 2B - STOCKS/SHARES

DETAILS (DESCRIPTION OF ITEM)	HOLDING	VALUE

TOTAL STOCKS/SHARES £

SECTION 2C - PROPERTY OTHER THAN HERITABLE

e.g. separately insured valuable items, paintings, antiques, jewellery etc.

DETAILS	VALUE

TOTAL PROPERTY OTHER THAN HERITABLE £

SECTION 2D - VEHICLES (INCLUDING CARAVANS)

only include vehicles which the adult owns, do not include motability vehicles.

DETAILS	VALUE

TOTAL VALUE OF VEHICLES £

SECTION 2E - BUSINESS ASSETS & INTERESTS

DETAILS	VALUE

TOTAL BUSINESS ASSETS & INTERESTS £

SECTION 2F - INSURANCE/ASSURANCE POLICIES

Surrender value if cash return expected, do not include if cash return only payable on death.

DETAILS	VALUE

TOTAL INSURANCE/ASSURANCE POLICIES £

TOTAL VALUE MOVEABLE ASSETS £

Section 3 - Adult's Income

(Please read Guidance Note 2.3)

(include all of the Adult's income, Pensions, Benefits and Allowances etc.

Please provide documentary evidence.)

DETAILS	AMOUNT	FREQUENCY	ANNUAL AMOUNT

TOTAL ANNUAL INCOME £

Section 4 - Any existing debts due by the adult as at date of your appointment by the court

(Please read Guidance Note 2.4)

Please provide evidence for all debts listed, e.g. care home charges, utility bills, council tax, rent arrears, credit card debt, mortgage etc.

DETAILS	AMOUNT

TOTAL EXISTING DEBTS £

Section 5 - Other relevant information

(Please read Guidance Note 2.5)

(please include any other financial interest the adult has, or may be due in the future, which has not been identified in the previous sections of the inventory.)

Section 6 - Summary of Inventory

Based on the information you have entered in Sections 1 – 4, the following totals have been calculated automatically. Please check that the totals are correct and then complete the declaration in Section 7 and the checklist in Section 8.

TOTAL HERITABLE ASSETS (1) £

TOTAL MOVEABLE ASSETS (2) £

TOTAL ANNUAL INCOME (3) £

TOTAL OF EXISTING DEBTS (4) £

Section 7 - Declaration

I/We hereby certify that, to the best of my/our knowledge, this inventory is a fair and full reflection of the adult's estate, as at the date of the court order.

FINANCIAL GUARDIAN DATE

FINANCIAL GUARDIAN DATE

FINANCIAL GUARDIAN DATE

Section 8 - Checklist

Have you completed all of the relevant sections, with due regard to the date of your appointment? (This is the date when the Sheriff granted your appointment. Not the date on the certificate issued by the Public Guardian.)

Has/have all financial guardians signed and dated the inventory?

Have you enclosed all of the necessary supporting documentation?

Have you enclosed the relevant fee? (please note the fee is based on the value shown in box 2 of Section 6 and your cheque should be made payable to the “Scottish Court Service”).

Have you retained a copy of this inventory for your own records? It may be required by you for future reference.

The form is now complete, please print it and send it to:

The Office of the Public Guardian
Hadrian House
Callendar Business Park
Callendar Road
Falkirk
FK1 1XR

DX: 550360 Falkirk 3
LP: LP-17 Falkirk

Telephone: 01324 678300
Fax: 01324 678301
E-mail: opg@scotcourts.gov.uk
Website: www.publicguardian-scotland.gov.uk

Version 3
August 2011