

**IN THE PROBATE COURT
COUNTY OF _____
STATE OF GEORGIA**

IN RE: ESTATE OF _____)
 _____)
PROPOSED WARD _____) **ESTATE NO.** _____

**ASSETS, INCOME, OTHER SOURCES OF FUNDS, LIABILITIES, AND EXPENSES
OF PROPOSED WARD**

REAL PROPERTY

(Indicate if property is jointly owned and with whom)

Description	County	State	Approximate equity
Parcel 1 _____			\$ _____
Parcel 2 _____			\$ _____
Parcel 3 _____			\$ _____

INCOME FROM ALL SOURCES

	Yearly Total
Social Security per year	\$ _____
SSI (Supplemental Security Income) per year	\$ _____
Retirement benefits per year	\$ _____
VA benefits per year	\$ _____
Other income per year, including, e.g., alimony, annuity, or trust distributions	\$ _____
Interest, dividend, or investment income	\$ _____
YEARLY TOTAL OF ALL INCOME	\$ _____

PERSONAL AND INTANGIBLE PROPERTY

(Indicate if property is jointly owned and with whom) _____

Approximate Current Value

(1) Checking/Savings/Money Market/Certificates of Deposit/Liquid Accounts:

Bank/Financial Institution/Broker	Acct. No.	Joint Owner (if any)	
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

(2) Stocks/Bonds/Investments (including retirement and profit-sharing accounts):

(a) Held by brokers:

Brokerage Firm or Institution	Acct. No.	Joint Owner (if any)	
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

(b) Privately held:

Company/Issuer	No. of Shares	Joint Owner (if any)	
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

(3) Automobiles:

Year/Make/Model	V.I.N.	Joint Owner (if any)	
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

(4) Other Assets of Significant Value: Joint Owner (if any)

Description	
_____	\$ _____
_____	\$ _____
_____	\$ _____

TOTAL VALUE OF PERSONAL AND INTANGIBLE PROPERTY \$ _____

The proposed ward owes the following debts/liabilities:

(1) Secured debts:

Obligor/Payee	Collateral	Solely/Jointly Owed	Approx. Current Balance
_____			\$ _____
_____			\$ _____
_____			\$ _____

(2) Unsecured debts:

Obligor/Payee	Acct. No.	Solely/Jointly Owed	Approx. Current Balance
_____			\$ _____
_____			\$ _____
_____			\$ _____

TOTAL DEBTS AND OTHER LIABILITIES OF PROPOSED WARD \$ _____

AVERAGE MONTHLY LIABILITIES AND EXPENSES

Household:

Care Facility/Rent/Mortgage payments:	\$ _____
Property taxes/Insurance	\$ _____
Utilities/Lawn Care/Pest Control	\$ _____
Miscellaneous Household food	\$ _____
Total Credit Account and Other Debt Payments	\$ _____
Other (specify)	\$ _____

Automotive/Transportation

Fuel and Repairs	\$ _____
Tags and License Fees, Insurance	\$ _____
Bus/Train/Taxi Fares	\$ _____

Minors or Other Dependents of the Proposed Ward

Child Care	\$ _____
School Tuition/Supplies/Expenses/Lunches	\$ _____
Clothing/Diapers /Grooming/Hygiene	\$ _____
Medical/Dental/Prescription	\$ _____
Entertainment/Activities	\$ _____

Other Insurance

Health \$ _____
Life/Disability \$ _____
Other (specify) \$ _____

Proposed Ward's Other Expenses

Laundry/Clothing/Grooming/Hygiene \$ _____
Medical/Dental/Prescriptions/Medications \$ _____
Entertainment/Vacations/Subscriptions/Dues \$ _____
Personal Caretakers/Cleaning Prsonnel \$ _____
Other (specify) \$ _____
Total Expenses \$ _____

Payments to Creditors:

Is the proposed ward behind in any debt payments? (yes)____ (no)____

If so, payee and amount: _____

SUMMARY

(1) Average Monthly Income \$ _____
(2) Average Monthly Expenses \$ _____