

Circuit Court for Howard County  
Wayne A. Robey  
Clerk of the Circuit Court  
9250 Judicial Way  
Ellicott City, MD 21043-4579  
(410) 313-2111 Main Line  
Civil (410) 313-3844 Criminal (410) 313-3822

**Instructions for Guardian Completing  
the Inventory for Guardianship of the Property**

Pursuant to Maryland Rule 10-707, a court appointed guardian of the property shall file an Inventory and Information Report within sixty (60) days has been appointed. **Please attach any documentation showing the current market value or value as of the date of the appointment of guardianship.**

**Part I:** The Fiduciary Estate now consists of the following assets:

- A. **Real Estate:** State the location of any real property, the liber/folio, the balance of any mortgages or other encumbrances on the property, if any, and the name of the Lender, if any.
- B. **Cash:** State the name of the financial institutions, the account numbers, and the type of the accounts (i.e., checking, savings, CD, etc.). **Also attach copies of the bank statements of all listed accounts that reflect the balance of the account as of the date of appointment.**
- C. **Personal Property:** Describe all personal property generally if the total value is under \$1,500.00. If any item of personal property is valued over \$1,500.00, then specifically itemize. If applicable, state the amount of any lien on an item of personal property. Itemize motor vehicle regardless of their value.
- D. **Stocks:** State the number of shares, class of shares and name of corporation.
- E. **Bonds:** State the face value, name of issuer, interest rate and maturity rate.

- F. Other: For those assets that don't fit within one of the listed category, describe generally (e.g. debts owed to estate, partnerships, cash value of life insurance policies, etc.)

Titling of Bank Accounts: Any funds received and/or held by the guardian for the benefit of the respondent should be deposited into an appropriately titled guardianship account. Pursuant to Maryland Rule 10-704, all guardianship accounts, including all bank accounts savings accounts or any account held by a financial institution, should be titled in the name of the guardian as guardian for the disabled person or minor. (Example: [Guardian's name] as Guardian for [Disabled/Minor's name]).

**Part II:**

Information Report

Answer both questions in this section. If the answer to either questions is "Yes," provide the requested information and attach any supporting documentation corroborating the value of the property.