

Initial Inventory
Guidelines to Marshalling Personal Property

- Initial Inventory must be filed within 60 days of the date the Guardian is appointed
- The information provided on the Inventory will reflect the value of the Ward's assets and liabilities on the date the guardian(s) was appointed (a/k/a "GID", guardianship initiation date)
- Attach all bank statements, appraisals and other supporting documents to the Inventory
- Read the instructions on each Schedule of the Inventory
- The Guardian must keep all property safe and keep accurate records of all the Ward's property, including the location and condition of the property. If in the Ward's best interest for the Ward to maintain the property, document it (especially jewelry).
- Consider possible conflicts of interest with anyone hired to assist with appraisals or other services to the ward and consult counsel if in doubt.

Digital Documentation

- Upon appointment, the Guardian **must** take photographs or video of all personal property and retain all digital documentation as required by Florida Statute, sec. 744.361.
- Photographs or videos do **not** need to be filed with the court unless specifically ordered by the court.
- If the Guardian is unable to access a location to take photographs or videos of property, the Guardian shall provide a written explanation and document in the initial inventory.

Important Documents & Mail

- Keep a record of all important documents (checkbooks, stocks & bonds, financial statements, Estate Planning documents, insurance policy, end of life preferences (advanced directives), funeral arrangements, etc.) and keep in a secure location. If in a safe deposit box, make sure there is a verified inventory.
- Keep a record of all the ward's state and federal IDs and public benefit IDs and healthcare/health insurance cards. (*Such as driver's*

license, gun permits, social security card, passport. Medicaid card, etc.)

- Document if any important documents, credit cards, or IDs were lost or stolen prior to the initiation of the guardianship. Were they reported to police or was an insurance claim filed.
- Consult with friends, family, and other interested persons to determine if the Ward has a history of hiding or concealing items.
- If the Guardian decides to shred any unneeded or duplicative documents, keep a detailed list of all records that were destroyed.
- Redirect mail to a secure location, if necessary. It may be necessary to provide Letters to USPS.
- Check with the post office to find out if the Ward has a post office box or receives mail at another location.

Miscellaneous Items

- Change the locks on the Ward's residence.
- Initial Inventory should specify all serial/model #s on electronics and weapons (firearms) and any other personal property with an identifying number.
- Initial Inventory should specify location make, model, year, VIN and odometer readings for vehicles.
- If the Ward retains any personal property or jewelry on their person, the Guardian shall provide this information on the inventory. Guardian shall take photographs of the items.
- The inventory requires the Guardian to specify the location the personal property was found (both address and room in residence), **including storage units**.
- If a lockbox or safe is found in the Ward's residence, take photos and video of all items and provide an itemized list on the inventory.
- Keep pictures and receipts for any items given to charity. (consult with counsel before donation as a court order may be required)
- Contact the Florida Highway Safety & Motor Vehicles to determine if there are any vehicles registered in the Ward's name and consider filing a stolen vehicle report with law enforcement, if appropriate.
- Contact banks where Ward has accounts to determine if there is a safe deposit box.
- Do NOT comingle any personal property with other Wards!