

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)

AMOUNT OF CAUTION

£

PREMIUM PAYABLE

£

Adult

TITLE

SURNAME

FORENAME

OTHER NAMES

Guardian

TITLE

SURNAME

FORENAME

OTHER NAMES

Joint Guardian (If Applicable)

TITLE

SURNAME

FORENAME

OTHER NAMES

Joint Guardian (If Applicable)

TITLE

SURNAME

FORENAME

OTHER NAMES

Section 1 - Heritable Assets

(Please read Guidance Note 2.1)

DOES THE ADULT HAVE ANY HERITABLE ASSETS?

YES – Please complete Sections 1A & 1B

NO – Please go to Section 2

SECTION 1A - HERITABLE ASSETS

(Include share of any property owned by the adult)

DETAILS	DATE OF VALUATION	ESTIMATED VALUATION

TOTAL VALUE HERITABLE ASSETS £

SECTION 2B - STOCKS/SHARES

DETAILS (DESCRIPTION OF ITEM INCLUDING HOLDING)	HOLDING	VALUE

TOTAL STOCKS/SHARES £

SECTION 2C - PROPERTY OTHER THAN HERITABLE

Household goods, valuable items e.g. jewellery, paintings etc

DETAILS	VALUE

TOTAL PROPERTY OTHER THAN HERITABLE £

SECTION 2D - VEHICLES (INCLUDING CARAVANS)

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

DETAILS	VALUE

TOTAL INSURANCE/ASSURANCE POLICIES £

TOTAL VALUE MOVEABLE ASSETS £

Section 3 - Adult's Income

(Please read Guidance Note 2.3)

DOES THE ADULT HAVE ANY INCOME?

YES – Please complete Section 3A

NO – Please go to Section 4

SECTION 3A - ADULT'S INCOME

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

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)

DOES THE ADULT HAVE ANY EXISTING DEBTS?

YES – Please complete Section 4A

NO – Please go to Section 5

SECTION 4A - EXISTING DEBTS

DETAILS	AMOUNT

TOTAL EXISTING DEBTS £

Section 5 - Other relevant information

(Please read Guidance Note 2.5)

IS THERE ANY OTHER RELEVANT INFORMATION THAT YOU WISH TO INCLUDE?

YES – Please complete Section 5A

NO – Please go to Section 6

SECTION 5A - OTHER RELEVANT INFORMATION

(please include any other financial interest the adult may have and 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 - Check List

Have you completed all of the relevant sections?

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