MONTGOMERY COUNTY, MD
Circuit Court

INVENTORY AND INFORMATION REPORT

Instruction Manual

The following is a step-by-step guide to how to complete the electronic version of the Inventory & Information Report. This form is to be used if you were appointed guardian of the property of a minor or disabled person.

> **If you have any questions,** please contact the Trust Office via phone at 240-777-9175, text message at 240-328-2214, or email at trustoffice@mcccourt.com.

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Additional Tips Before You Get Started

- The PDF report will only open properly from a desktop computer (either a PC or a Mac).

- If you do not already have Adobe Acrobat Reader on your computer, you will need to download and install it for free from https://get.adobe.com/reader/ before opening the report.

- Once you click on the link for one of the electronic versions from the website, the report will open automatically, or you will be asked to download it before you make any changes and save it.

- When you first open the report, select FILE>SAVE AS from the top Acrobat menu and save the report to your computer under whichever folder is most convenient for you.

- Once you save the report to the appropriate folder, be sure to save it often as you fill it out.

- Please run a Spell Check (see button on top of first page) before submitting your report.

Check Spelling in Form

- There is no submit button to send the report electronically. You still need to print the report, sign the last page, and mail it within 60 days of your appointment as guardian of the property to:

Montgomery County Circuit Court Trust Office
50 Maryland Ave., North Tower #2400
Rockville, MD 20850

Entering Data into the Report

Tabbing. It is easiest to tab from field to field throughout the report. To go back a space, use SHIFT-TAB on your keyboard.

Calculated fields. Fields that are shaded gray are calculated fields, so you will not be able to edit those.
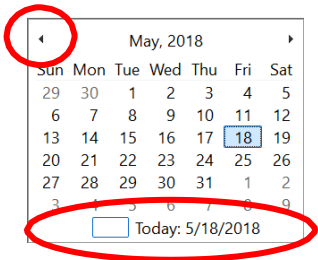
A. Real Estate

(State location, liber/folio, balance of mortgage, and name of lender, if any)

ESTIMATED FAIR MARKET VALUE

$

X

TOTAL $ 0.00

Adding rows to, and deleting rows from, a table. There are several tables included in the report. If you need to add a row to any table, click on the "Add Item" button. To delete a row you accidentally added, click the "X" at the end of the row.

Add Item

Calendar fields. To choose a value from the calendar for the date fields on the first and last pages, click on the field, select the dropdown to the right of the field, and the calendar picker will pop-up. Use the arrow keys to scroll through the months; you can also select the "today" option from the bottom to add today's date to the field. If you prefer to type dates in, remember the format is mm/dd/yyyy (e.g., 05/18/2018).

◄	May, 2018					►
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3						9

Today: 5/18/2018

Text wrapping. You can add as much text as you like to a field, and it will wrap for you. You can also use a hard return (ENTER key on your keyboard) within a row if you want to separate lines.

Copying and pasting. At any time, you can highlight information in one field with your mouse and copy (CTRL-C on your keyboard) and later paste (CTRL-V) the same information to another field.

Comments. There is a COMMENTS box at the end of each section, where you can type any details or clarifications about the information you have entered in the earlier tables for that section.

Sections that do not apply. If a table does not apply (e.g., if the ward does not have credit cards, enter "N/A" or "None" in the first field.

Heading

Click on the first field under "In the matter of" to start completing the report. Enter the name of the disabled person and/or minor (from this point on referred to as the "ward") for whom you are guardian and tab to enter associated case numbers.

Inventory – Part I, Part II, Part III

Part I is where you enter information on all assets (defined as any property with value) the ward owns.

Use the calendar drop-down (see explanation on p. 3) to select your date of appointment.

List all ward properties in Section A. Be sure to include the address, balance of mortgage, name of the lender and type of ownership as applicable, in the first column.

Remember, if you run out of rows to enter information in this or any of the other tables, click on the ADD ITEM button.

As mentioned above, the gray shaded area represents the totals of all the rows; totals calculate for this table as well as the remaining tables.

List all ward bank accounts, such as checking, savings, CDs, and money market accounts in Section B. Include the account numbers, type of account, and balances at the time of your appointment for each account.

List ward's brokerage accounts, stocks, bonds and other securities in Section C. If the ward owns none, type "N/A" or "None."

List any retirement accounts in Section D, if any.

List all ward's vehicles and personal property where the value of the property is over $2,500 in Section E and Section F, respectively.

In Section G, list any other assets such as annuities, burial account/plots, cash values of life insurance policies and 529 plans. Please note that term life insurance is not considered as an asset and should not be reported at all.

Part II is where you enter the liabilities such as credit cards, judgments, and other loans. If none, please state.

In Part III, list the names and amount of income the ward receives as monthly benefits, such as social security, pensions, annuities, and rental income.

Finally, add any detailed comments about the information you typed above into the user comments, if any. You may attach additional pages to the report if you need more room.

Information Report – Part IV and Part V

Part IV is where you will enter information on other interests the ward holds.

If you check the "Yes" box for Question (1), list the name, address, and relationship of the ward to the co-owner of any property, as well as the type, description, and the ward's ownership interest in each property. If you check "No," enter "N/A" or "None" in the first column.

If you check the "Yes" box for Question (2), list the description of any other property not yet listed on this report, as well as the amount, date of establishment, and type of instrument for each property. If you check "No," enter "N/A" or "None" in the first column and proceed to Part V.

In Part V – use Section A to enter health insurance and other matters. Using the drop-down arrow, choose the type of insurance the ward has such as medical, dental and vision and list the name of the provider(s) and attach proof or notice of eligibility. If there are any outstanding medical expenses, please explain in the comment box. If there are any other matters that the court should be aware of, use Section B. to inform the Court.

Verification

Complete the Verification section for yourself, any other fiduciaries, and the name of your attorney (if applicable), print the report, and sign and mail it to the address on p. 2 of this Manual.

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