

THE STATE OF NEW HAMPSHIRE
JUDICIAL BRANCH

<http://www.courts.state.nh.us>

Court Name: 9TH CIRCUIT COURT - PROBATE DIVISION - NASHUA

Case Name: ESTATE OF ROBERT W. ROBERTSON

Case Number: 2011-12345

(if known)

INVENTORY OF FIDUCIARY

☐ Executor/Administrator ☐ Guardian/Conservator ☐ Trustee

b Original

.. Amended (Attach written explanation)

1. Fiduciary Name John Q. Esquire

Fiduciary Name State National Bank, NA

2. Attorney name William Williams Bar ID # 4956

3. Appraiser named by fiduciary on petition (if applicable) _____

4. BOND AMOUNT ORDERED BY THE COURT \$ 0.00

5. Answer the following questions only if processing the estate of a deceased person.

If you have an attorney, have attorney fee arrangements been discussed?

☐ Yes ☐ No

Have fiduciary fee arrangements been considered?

☐ Yes ☐ No

6. ESTATE SUMMARY

For decedent estates, all values should be as of the date of death. For all other case types, values should be as of the date of the fiduciary's appointment.

A. TOTAL VALUE OF REAL ESTATE 0.00

On a sheet of paper (Attachment A), list each piece of real estate including its street address, city/town where real estate is located, county where deed is recorded, book and page of deed, and the value of each piece of real estate.

B. TOTAL VALUE OF PERSONAL ESTATE (from total on second page) 627,500.83

C. TOTAL VALUE OF ENTIRE ESTATE (Add A and B above) 627,500.83

Examined and accepted by court,

Date

Judge

7. PERSONAL ESTATE DETAIL

Enter the total value of the personal property for each category below, and list the specific items and their value for each category on the appropriate attachment. For decedent estates, all values should be as of the date of death. For all other case types, values should be as of the date of the fiduciary's appointment.

A. Cash On Hand (No attachment is required.) 14,750.00

B. Attachment B - Household Furnishings and Effects 0.00

On a sheet of paper (Attachment B), list the contents of the household and their values. Do not list wearing apparel, Bibles, family pictures, photographs, or other personal trinkets of sentimental rather than intrinsic value. If items have been appraised by a professional appraiser, enter the total value and attach a copy of the appraisal to Attachment B.

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- C. Attachment C – Other Tangible Personal Property **0.00**
On a sheet of paper (Attachment C), list all other tangible personal property including motor or recreational vehicles, farmers' utensils, mechanics tools and livestock. For each motor or recreational vehicle, list the year, make, model and vehicle identification number (VIN). If items have been appraised by a professional appraiser, enter the total value and attach a copy of the appraisal to Attachment C.
- D. Attachment D – Stocks and Bonds **582,750.83**
On a sheet of paper (Attachment D), list stock or bond name, number of shares and value per share. See additional information in the 'Personal Estate Detail' box above.
- E. Attachment E – Deposited in Banks/Financial Institutions **0.00**
On a sheet of paper (Attachment E), list the name and address of the bank or financial institution, the account or certificate number, the date of the last interest/dividend paid and the account balance.
- F. Attachment F – BUSINESS ASSETS **0.00**
On a sheet of paper (Attachment F), list all business assets and their values.
- G. Attachment G – Notes Receivable and Other Written Evidence of Debt Owed to the Deceased or Ward **0.00**
On a sheet of paper (Attachment G), list debtor and/or payor, the amount owed, the date of the note and terms of payment.
- H. Attachment H– Other Miscellaneous Personal Property **30,000.00**
On a sheet of paper (Attachment H), list any personal property not listed above and the individual values.)

TOTAL VALUE OF PERSONAL ESTATE **627,500.83**
Add amounts on lines 7A through 7H (Cash on Hand plus Attachments B through H).
Copy the 'total value of personal estate' amount to page 1, line 6B of the Estate Summary.

8. This section must be completed by the appraiser named in #3 of this form. If no appraiser was named, proceed to #9 below.

I, _____, the appraiser of the estate of
Robert W. Robertson, swear that I have acted faithfully, impartially and
according to my best judgment.

Date

Appraiser

State of **NEW HAMPSHIRE**, County of **HILLSBOROUGH**

This instrument was acknowledged before me on _____ by _____
Date Appraiser Name

My Commission Expires _____
Affix Seal, if any

Signature of Notarial Officer / Title

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9. This section must be completed by the fiduciary completing the form.

I/We, John Q. Esquire, State National Bank, NA the fiduciary, of the estate of Robert W. Robertson, swear that if an appraiser was appointed by the court (the person named in #3 on page 1 of this form), I have shown the appraiser the total estate of the ward or deceased of which I have knowledge or possession. If there was no court appointed appraiser, I swear I have acted faithfully, impartially and according to my best judgment. I further swear that if I have knowledge or possession of any further estate of the ward or deceased, I will immediately amend my inventory.

I certify that a copy of this document has been provided to the parties who have filed an appearance for this case or who are otherwise interested parties.

Date

John Q. Esquire

Date

State National Bank, NA

State of NEW HAMPSHIRE, County of HILLSBOROUGH

This instrument was acknowledged before me on _____ by _____
Date **John Q. Esquire**

My Commission Expires _____
Affix Seal, if any

Signature of Notarial Officer / Title

ATTENTION BENEFICIALLY INTERESTED PARTIES

This Inventory may be accepted by the Probate Division unless a written objection, containing the specific factual or legal basis for the objection, is filed within 10 days after the date the Inventory is filed in the Probate Division. Failure to file an objection may forfeit your right to a hearing concerning the Inventory or your objection, and the Probate Division may then act without a hearing or any further notice to you.

ESTATE OF ROBERT W. ROBERTSON
Attachment D
Stocks and Bonds
From 01/10/2011 to 12/31/2011

Description		Date of Death Value	
No. of	Stocks		
Shares			
1,000	A C Moore Arts & Crafts Inc Common	\$	13,250.00
	Dividend at Date of Death		230.00
3,000	Acorn Prods Inc., common		54,000.00
	Total Stocks	\$	67,480.00
Face			
Amount	Bonds, Debentures & T-Bills		
500,000	Aetna Life & Casualty Note 6.375%, 3/15/2015		505,000.00
	Interest at Date of Death		10,270.83
	Total Bonds, Debentures & T-Bills	\$	515,270.83
	Total Attachment D	\$	582,750.83

ESTATE OF ROBERT W. ROBERTSON
Attachment H
Other Miscellaneous Personal Property
From 01/10/2011 to 12/31/2011

Description		Date of Death Value	
No. of	Mutual Funds		
Shares			
500	59 Wall Str Fds Inc., U S Equity Fd., Mutual Funds	\$	22,500.00
	Total Mutual Funds	\$	22,500.00
	Miscellaneous		
	Tangible Personal Property		7,500.00
	Total Miscellaneous	\$	7,500.00
	Total Attachment H	\$	30,000.00