

**IN THE ORPHANS' COURT FOR
(OR)
BEFORE THE REGISTER OF WILLS FOR**

Baltimore County **MARYLAND**

IN THE ESTATE OF:
John Smith

ESTATE NO. 123456

**SAMPLE
INVENTORY
Summary**

DATE OF DEATH 01/01/2023

Schedule	Type of Property	Appraised Value
A Real		\$ <u>250,000.00</u>
B Leasehold		\$ <u>0.00</u>
C Tangible personal		\$ <u>15,800.00</u>
D Corporate stocks		\$ <u>188,600.00</u>
E Bonds, notes, mortgages, debts due to the decedent		\$ <u>300,000.00</u>
F Bank accounts, savings and loan accounts, cash		\$ <u>70,000.00</u>
G All other interests		\$ <u>500.00</u>
	Total	\$ <u>1,324,400.00</u>

I solemnly affirm under the penalties of perjury that the contents of this document are true to the best of my knowledge, information, and belief and that any property valued by me which I have authority as personal representative to appraise has been valued completely and correctly in accordance with law.

**If there is an attorney,
the attorney signs here.**

Attorney

Address

Telephone Number

Facsimile Number

Email Address

Sign here

Personal Representative Beloved Daughter Date

Personal Representative Date

Personal Representative Date

Sample
INVENTORY
Supporting Schedule

Inventory of Estate of
John Smith

Estate No. 123456

SCHEDULE A - Real Property

<u>Item No.</u>	<u>Description</u>	<u>Market Value</u>
1.	800 Dogwood Court, Baltimore, MD 21299 Per Attached SDAT Assesment *cannot accept phase-in assessment valuation on SDAT.	\$250,000.00

- Acceptable valuations:

* SDAT;

*Appraisal as of the date of death by a certified appraiser; or

*Contract of sale (gross sale price) sold within one year from the date of death.

Backup for all valuations is required.

Total \$250,000.00

Verification of appraiser other than personal representative, if not supplied separately:

I solemnly affirm under the penalties of perjury that I appraised the property listed on this schedule on the _____ day of _____, _____, and that the appraisal was done impartially and to the best of my skill and judgement.

Signature of appraiser

Printed Name

Address

Instructions:

Pursuant to Code, Estates and Trusts Article §7-201.

1. Describe each item in reasonable detail, and indicate its appraised gross market value as of the date of death of the decedent.
2. If an item is encumbered, show the type and amount of any encumbrance in the description.
3. For real and leasehold property, give a description sufficient to identify the property and the title reference by liber and folio.
4. In listing tangible personal property it is not necessary to list wearing apparel other than furs and jewelry.

Sample
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Inventory of Estate of
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SCHEDULE Schedule B - Leasehold

<u>Item No.</u>	<u>Description</u>	<u>Market Value</u>
1.	Real property subject to a ground rent appears on schedule B.	

Total \$0.00

Verification of appraiser other than personal representative, if not supplied separately:

I solemnly affirm under the penalties of perjury that I appraised the property listed on this schedule on the _____ day of _____, _____, and that the appraisal was done impartially and to the best of my skill and judgement.

Signature of appraiser

Printed Name

Address

Instructions:

Pursuant to Code, Estates and Trusts Article §7-201.

1. Describe each item in reasonable detail, and indicate its appraised gross market value as of the date of death of the decedent.
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SCHEDULE C - Tangible Personal Property

<u>Item No.</u>	<u>Description</u>	<u>Market Value</u>
1.	2001 Subaru Outback Wagon, see Kelly Blue Book appraisal attached as Exhibit C-1 Trade in Value \$7,310.00 Private Party Value 9,465.00 Average: \$8,387.50	\$8,387.50
2.	Tangible personal property as described in appraisal by Name of Appraiser. CAI, AARE attached hereto as Exhibit C-2	\$7,412.50

Back up for all valuations is required.

Total \$15,800.00

Verification of appraiser other than personal representative, if not supplied separately:

I solemnly affirm under the penalties of perjury that I appraised the property listed on this schedule on the _____ day of _____, _____, and that the appraisal was done impartially and to the best of my skill and judgement.

Signature of appraiser

Printed Name

Address

Instructions:

Pursuant to Code, Estates and Trusts Article §7-201.

1. Describe each item in reasonable detail, and indicate its appraised gross market value as of the date of death of the decedent.
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SCHEDULE D - Corporate Stocks

Item No.	Description	Market Value
1.	265 Granny Smith, Inc. common (NYSE) @52.54 per share*	\$40,233.90
2.	344 shs. Big Gas Corporation, common, NYSE @99.1175 per share*	\$34,096.42
3.	500 shs. Widgets Corporation, class A (NASDAQ) @ 228.53 per share*	\$114,269.68

*Appraised by the personal representative

You must use the value of the stocks as of the date of death.

Total \$188,600.00

Verification of appraiser other than personal representative, if not supplied separately:

I solemnly affirm under the penalties of perjury that I appraised the property listed on this schedule on the _____ day of _____, _____, and that the appraisal was done impartially and to the best of my skill and judgement.

 Signature of appraiser

 Printed Name

 Address

Instructions:

Pursuant to Code, Estates and Trusts Article §7-201.

1. Describe each item in reasonable detail, and indicate its appraised gross market value as of the date of death of the decedent.
2. If an item is encumbered, show the type and amount of any encumbrance in the description.
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Sample

INVENTORY Supporting Schedule

Inventory of Estate of
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Estate No. 123456

SCHEDULE E- Bonds, Notes, Mortgages

<u>Item No.</u>	<u>Description</u>	<u>Market Value</u>
1.	\$300,000.00 promisory note dated July 1, 2022, 4.85% due january 1, 2032 from Beloved Daughter*	\$300,000.00

Back up for values may be required.

*Appraised by the personal representative

For bonds -

**You must list the number of bonds

For Series E/EE Bonds: these should be valued as of the date of death. Attach back up to show valuation, which can be found online.

For Series H/I Bonds: You may use the face value of the bond.

Total \$300,000.00

Verification of appraiser other than personal representative, if not supplied separately:

I solemnly affirm under the penalties of perjury that I appraised the property listed on this schedule on the _____ day of _____, _____, and that the appraisal was done impartially and to the best of my skill and judgement.

Signature of appraiser

Printed Name

Address

Instructions:

Pursuant to Code, Estates and Trusts Article §7-201.

1. Describe each item in reasonable detail, and indicate its appraised gross market value as of the date of death of the decedent.
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SCHEDULE F - Bank accounts, Cash

Item No.	Description	Market Value
1.	Big Bank Checking Account include the last 4 digits of the account #	\$35,000.00
2.	Big Bank Savings Account	\$35,000.00
*Appraised by the personal representative		

**Be sure to use the exact date of death value to the penny.
Do not round up or down.**

Total \$70,000.00

Verification of appraiser other than personal representative, if not supplied separately:

I solemnly affirm under the penalties of perjury that I appraised the property listed on this schedule on the _____ day of _____, _____, and that the appraisal was done impartially and to the best of my skill and judgement.

Signature of appraiser

Printed Name

Address

Instructions:

Pursuant to Code, Estates and Trusts Article §7-201.

1. Describe each item in reasonable detail, and indicate its appraised gross market value as of the date of death of the decedent.
2. If an item is encumbered, show the type and amount of any encumbrance in the description.
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SCHEDULE

G - All other interests

<u>Item No.</u>	<u>Description</u>	<u>Market Value</u>
1.	500 u. Private Equity Fund	\$500.00
Backup for values may be required.		

*Appraised by the personal representative

Also included on Schedule G:

* Any brokerage accounts that include multiple investment accounts. Include backup (statement copies) that show the breakdown of the exact holdings of each investment account.

*Refunds

*Rebates

*Nursing home refunds

Total \$500.00

Verification of appraiser other than personal representative, if not supplied separately:

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Signature of appraiser

Printed Name

Address

Instructions:

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