

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, state bar number, and address):

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ATTORNEY FOR (Name): David Lowry, Conservator

SUPERIOR COURT OF CALIFORNIA, COUNTY OF Orange

STREET ADDRESS: 341 The City Drive

MAILING ADDRESS: 341 The City Drive

CITY AND ZIP CODE: Orange, CA 92868-3209

BRANCH NAME: Lamoreaux Justice Center

ESTATE OF (Name):

JEANNE LOWRY

☐ DECEDENT ☒ CONSERVATEE ☐ MINOR

INVENTORY AND APPRAISAL

☐ Partial No.:☐ Corrected☒ Final☐ Reappraisal for Sale☐ Supplemental☐ Property Tax Certificate

FOR COURT USE ONLY

You fill this line in with the total value of the noncash assets listed in Attachment 2, given by the probate referee or, if he or she does not fill in a total figure, calculated by you by adding the values for those assets given by the referee.

After probate referee's figure is put in, add items 1 and 2, and write total here. Note: You will need this figure to start your Account to the court. See Appendix D.

CASE NUMBER:

A-396254

Date of Death of Decedent or of Appointment of Guardian or Conservator:

March 8, 2012

APPRAISALS

1. Total appraisal by representative, guardian, or conservator (Attachment 1): \$
2. Total appraisal by referee (Attachment 2): \$

TOTAL: \$

57,844.59

DECLARATION OF REPRESENTATIVE, GUARDIAN, CONSERVATOR, OR SMALL ESTATE CLAIMANT

3. Attachments 1 and 2 together with all prior inventories filed contain a true statement of
☒ all ☐ a portion of the estate that has come to my knowledge or possession, including particularly all money and all just claims the estate has against me. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 1.
4. ☐ No probate referee is required ☐ by order of the court dated (specify):
5. **Property tax certificate.** I certify that the requirements of Revenue and Taxation Code section 480
- a. ☐ are not applicable because the decedent owned no real property in California at the time of death.
- b. ☐ have been satisfied by the filing of a change of ownership statement with the county recorder or assessor of each county in California in which the decedent owned property at the time of death.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

David Lowry

(TYPE OR PRINT NAME; INCLUDE TITLE IF CORPORATE OFFICER)

Conservator signs after probate referee returns this form.

(SIGNATURE)

STATEMENT ABOUT THE BOND

(Complete in all cases. Must be signed by attorney for fiduciary, or by fiduciary without an attorney.)

6. ☐ Bond is waived, or the sole fiduciary is a corporate fiduciary or an exempt government agency.
7. ☐ Bond filed in the amount of: \$ ☐ Sufficient ☐ Insufficient
8. ☐ Receipts for: \$ have been filed with the court for deposits in a blocked account at (specify institution and location):

Date:

Jared Roberts

(TYPE OR PRINT NAME)

Conservator's lawyer (or you, if you do not have a lawyer) completes and signs this section.

(SIGNATURE OF ATTORNEY OR PARTY WITHOUT ATTORNEY)

ESTATE OF (Name): JEANNE LOWRY	CASE NUMBER: A-396254
<input type="checkbox"/> DECEDENT <input checked="" type="checkbox"/> CONSERVATEE <input type="checkbox"/> MINOR	

DECLARATION OF PROBATE REFEREE

9. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 2.
10. A true account of my commission and expenses actually and necessarily incurred pursuant to my appointment is:
- | | |
|-----------------------|-----------|
| Statutory commission: | \$ |
| Expenses (specify): | \$ |
| TOTAL: | \$ |

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

Probate referee completes and signs this section.

(TYPE OR PRINT NAME)

(SIGNATURE OF REFEREE)

INSTRUCTIONS

(See Probate Code sections 2610-2616, 8801, 8804, 8852, 8905, 8960, 8961, and 8963 for additional instructions.)

- See Probate Code section 8850 for items to be included in the inventory.
- If the minor or conservatee is or has been during the guardianship or conservatorship confined in a state hospital under the jurisdiction of the State Department of Mental Health or the State Department of Developmental Services, mail a copy to the director of the appropriate department in Sacramento. (Prob. Code, § 2611.)
- The representative, guardian, conservator, or small estate claimant shall list on Attachment 1 and appraise as of the date of death of the decedent or the date of appointment of the guardian or conservator, at fair market value, moneys, currency, cash items, bank accounts and amounts on deposit with each financial institution (as defined in Probate Code section 40), and the proceeds of life and accident insurance policies and retirement plans payable upon death in lump sum amounts to the estate, except items whose fair market value is, in the opinion of the representative, an amount different from the ostensible value or specified amount.
- The representative, guardian, conservator, or small estate claimant shall list in Attachment 2 all other assets of the estate which shall be appraised by the referee.
- If joint tenancy and other assets are listed for appraisal purposes only and not as part of the probate estate, they must be separately listed on additional attachments and their value excluded from the total valuation of Attachments 1 and 2.
- Each attachment should conform to the format approved by the Judicial Council. (See *Inventory and Appraisal Attachment* (form DE-161/GC-041) and Cal. Rules of Court, rules 2.100—2.119.)

ESTATE OF (name):
JEANNE LOWRY

CASE NUMBER:
A-396254

**INVENTORY AND APPRAISAL
ATTACHMENT NO.: 1**

(In decedents' estates, attachments must conform to Probate Code section 8850(c) regarding community and separate property.)

Page: 1 of 1 total pages.
(Add pages as required.)

Item No.	Description	Appraised value
1.	Cash found at 121 View Place, Newport Beach, California, conservatee's residence	\$ 250.00
2.	Balance in checking account No. 14655, Southern California Savings and Loan, 34900 Irvine Grove Blvd., Newport Beach, California 92660	7,842.38
3.	Balance in savings account No. 14654, Southern California Savings and Loan, 34900 Irvine Grove Blvd., Newport Beach, California 92660	38,347.04
4.	Certificate of Deposit No. 1765432, Hometown Federal Bank, 900 Washington Blvd., Los Angeles, CA 90083, in the name of Jeanne Lowry and Marshall Lowry (deceased) as joint tenants	10,000.00
5.	Uncashed check from East Coast Teacher's Pension Fund dated March 1, 2012, payable to conservatee	554.47
6.	Uncashed check from Social Security Administration dated March 1, 2012, payable to conservatee	498.00
7.	Uncashed dividend check from Safeguard Investment Mutual Fund, dated March 2, 2012, payable to conservatee	352.70

The conservator of the estate lists all cash assets and writes down their values.

The conservator totals the values of the Attachment 1 cash assets. On the last page of the attachment, the conservator enters "TOTAL CASH ASSETS" in the final Description fillable field and places the total in the final Appraised value fillable field.

TOTAL CASH ASSETS

57,844.59

ESTATE OF (name):
JEANNE LOWRY

CASE NUMBER:
A-396254

INVENTORY AND APPRAISAL
ATTACHMENT NO.: 2

(In decedents' estates, attachments must conform to Probate Code section 8850(c) regarding community and separate property.)

Page: 1 of 1 total pages.
(Add pages as required.)

<u>Item No.</u>	<u>Description</u>	<u>Appraised value</u>
1.	Real property in the City of Newport Beach, County of Orange, State of California, described as Lot 36 in Block 420 of Tract 91, as per map recorded in Book 2 of Parcel Maps, page 42, in the office of the County Recorder of said county. This property is commonly known as 121 View Place Newport Beach, California (improved with single family dwelling). Assessor's Parcel No. 3.	\$
2.	Vacation home. Real property in the City of Palm Springs, County of Riverside, State of California, described as Lot 3 in Block 102 of Subdivision 82, as per map recorded in Book 43 of Maps, page 29, in the office of the County Recorder of said county. This property is commonly known as 2446 W. Sunburst, Palm Springs, California. Assessor's Parcel No. 18.3.	
3.	Household furniture and furnishings at 121 View Place, Newport Beach.	
4.	1425 shares Safeguard Investment Mutual Fund.	
5.	Seven \$100 U.S. Savings Bonds, Series EE, issued May 2, 1955.	
6.	Diamond wedding ring (2 carat).	

The conservator of the estate writes a detailed description of all noncash assets. The probate referee fills in appraised values.

The referee may total the values of the Attachment 2 noncash assets and place the total on the last page of the attachment. If he or she does not, the conservator should add that total from the values of the individual assets given by the referee after the referee returns the Inventory and Appraisal, enter "TOTAL NONCASH ASSETS" in the final Description fillable field of the last page of the attachment, and place the total in the final Appraised value fillable field, shown here as a grey box.

TOTAL NONCASH ASSETS