

SUPREME COURT OF THE STATE OF NEW YORK  
COUNTY OF SUFFOLK

-----X  
In the Matter of the Guardianship of

**STATEMENT OF ASSETS AND  
NOTICE OF CLAIM**

An Incapacitated Person  
-----X

Index No.: \_\_\_\_\_

TO THE SUPREME COURT (COUNTY COURT) OF THE STATE OF NEW YORK,  
COUNTY OF SUFFOLK

1. Name of Guardian: \_\_\_\_\_
2. Name of the Incapacitated Person: \_\_\_\_\_
3. Last address or residence of the Incapacitated Person: \_\_\_\_\_  
\_\_\_\_\_
4. Date of Death of Incapacitated Person: \_\_\_\_\_

Please list the **approximate value** as of the date of death of the assets marshaled by the guardian and under the control of the guardian, please be specific, please itemize and use additional pages as necessary:

5. Describe the location and value of guardianship bank accounts:  
  
A. Bank: \_\_\_\_\_  
Approximate Current Value: \_\_\_\_\_  
  
B. Bank: \_\_\_\_\_  
Approximate Current Value: \_\_\_\_\_
6. List the type, location and value of any securities, stocks, bonds, mutual funds, certificates of deposit, interests in business, money owed to the Incapacitated Person, etc.  
  
\_\_\_\_\_  
  
\_\_\_\_\_  
  
\_\_\_\_\_  
  
\_\_\_\_\_
7. List any value personal property of the guardianship, e.g., automobiles, valuable jewelry, art work, antiques, valuable home furnishings:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. List amount of any Medicaid claims against the guardianship: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

9. List any tax liens or taxes due (income, estate, property) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

10. List any other outstanding debts, claims, or liens against the guardianship assets (include unpaid bills from household expenses, credit card debt, funeral expenses, care providers, mortgages, coop/condo maintenance, loans, home equity loans: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11. List the approximate amount of administrative cost anticipated necessary to end the guardianship (e.g. attorney fees, accountant fees, court examiner fees, guardian compensation, bond premiums):

\_\_\_\_\_  
\_\_\_\_\_

Dated: \_\_\_\_\_, New York

\_\_\_\_\_, 20\_\_

\_\_\_\_\_  
Signature of Guardian

Sworn to before me this  
\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_

\_\_\_\_\_  
Notary Public, State of New York

TO:

\_\_\_\_\_, Court Examiner and

\_\_\_\_\_, Court-Appointed Personal  
Representative, or

If no Court-Appointed personal representative:

\_\_\_\_\_, Personal Representative  
Named in Incapacitated Person's will or trust, **and**

\_\_\_\_\_, Public Administrator or  
Chief County Fiscal Officer