



Royal Court of Jersey

Judicial Greffe

Delegate for property and affairs Inventory of assets



Capacity and Self Determination (Jersey) Law 2016

How to fill in this form

How to complete this form

PLEASE TYPE OR WRITE IN CAPITAL LETTERS USING A BLACK PEN

X	Mark your choice with an X
	If you make a mistake, fill in the box completely and then mark the correct choice with an X

If a question does not apply to you, leave it blank and go to the next question

More information

Make sure you answer the questions in this form as fully as possible. We may still need to contact you for more information.

Your privacy

We will treat any information you give us in line with The Data Protection (Jersey) Law 2018. This means that we will not give information to anyone else unless we have a safeguarding concern or we have to apply to the Court, when it would be available to go to anyone involved in the court proceedings.

Need help?

Call the Judicial Greffe on 441362 or 441303.

'You' and the 'Person'

Where you see the word "you" in this form, it means the delegate who is filling in the delegate report form. Where you see the word "Person" (with a capital P), it means the person you were appointed to help make decisions.

Please return this form to the Protection Team, Judicial Greffe, Royal Court Buildings, St Helier, within 90 days of your appointment as Delegate.

Inventory

(This document is required to have been completed by the Delegate and returned to the Judicial Greffe within 90 days of your appointment).

Section 1

Date of your appointment as Delegate

Start date

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Delegate details

First names

--

Last name

--

Address

--

Postcode

--

Telephone number

--

Email

--

The Person's details

First names

--

Last name

--

Address

--

Postcode

--

Telephone number (optional)

--

Does the Person spend time at another address?

Yes No

If yes, X the box and give the other address below.

Other address

--

Postcode

--

Type of accommodation

--

Section 2: The Person's assets

Immovable Property (e.g. houses, flats, share transfer apartments and land)

Address

Postcode

Have you been granted authority as delegate to manage the Person's immovable property? (The authority will be set out in the Act of Court when you were first appointed).

Yes No

If 'Yes', please give details of the immovable property you manage below. If 'No' proceed to "Assets that you manage on behalf of the Person".

Who lives at this property?

The Person		The property is empty	
The Person's spouse / partner / civil partner		Other (for example has a private tenant). If 'Other' tell us more.	
The Person's parents			
The Person's children/other dependents			

Is the property fully or part-owned by the Person?

Fully owned Part-owned

If part-owned, what is the Person's share of the Property? %

What is the estimated value of the property? £ .

Is there an outstanding mortgage on the property?

Yes No If 'Yes', how much is left to pay? £ .

Is the property subject to an equity release scheme¹?

Yes No

¹ **Equity release** is a means of retaining use of a house which has capital value, while also obtaining a lump sum or a steady stream of income; a loan using the value of the house.

Are there any other charges² over the property, for example a Long-Term Care (LTC) Bond to help pay towards care fees?

Yes No If yes, with which organisation?

If the property is rented out what is the monthly rental income?

£ .

If the property is rented out, when does the current rental agreement end?

More than one property? (Extra pages can found and printed off from gov.je or are available from the Judicial Greffe. Attach these to the Inventory).

Section 3:

Bank accounts that you manage on behalf of the Person

Bank Name	Account type (current/savings)	Balance at the date of your appointment as Delegate
<input type="text"/>	<input type="text"/>	£ <input type="text"/> . <input type="text"/>

Branch Sort Code	Last 4 digits of the bank account number
<input type="text"/> - <input type="text"/> - <input type="text"/>	<input type="text"/>

Bank Name	Account type (current/savings)	Balance at the date of your appointment as Delegate
<input type="text"/>	<input type="text"/>	£ <input type="text"/> . <input type="text"/>

Branch Sort Code	Last 4 digits of the bank account number
<input type="text"/> - <input type="text"/> - <input type="text"/>	<input type="text"/>

Bank Name	Account type (current/savings)	Balance at the date of your appointment as Delegate
<input type="text"/>	<input type="text"/>	£ <input type="text"/> . <input type="text"/>

Branch Sort Code	Last 4 digits of the bank account number
<input type="text"/> - <input type="text"/> - <input type="text"/>	<input type="text"/>

² **A charge on property:** a legal agreement that gives a lender the right to take the borrower's property if that person does not pay back the money they borrowed. In certain circumstances the lender can force the sale of the property over which it has a charge so that the loan might be repaid.

Bank Name	Account type (current/savings)	Balance at the date of your appointment as Delegate
<input type="text"/>	<input type="text"/>	£ <input type="text"/> . <input type="text"/>
Branch Sort Code	Last 4 digits of the bank account number	
<input type="text"/> - <input type="text"/> - <input type="text"/>	<input type="text"/>	

Need to add more bank accounts? Use the extra sheet supplied with this form

If any of the accounts you manage on behalf of the Person are in joint names, please give details below

Name of Bank and last 4 digits of the account number	Whose names are on the bank account?	Does the money in the account belong solely to the Person <u>or</u> is the money shared with the other individual(s) named on the account?

Section 4: Other assets that you manage on behalf of the Person

If you manage any of the following assets on behalf of the Person, provide us with the total value for each at the date of your appointment as Delegate.

Savings and Investments (total) £ .

Insert the form of investment and company name in the box below.

Stocks and Shares (total) £ .

List the Company name/s and no. of shares held in the box below.

Premium bonds £ .

Vehicles (estimate) £ .

Give details of the car/boat/motorcycle in the box below.

Assets held outside Jersey

Give details of these assets in the box provided below.

£ .

Survivor's benefit (weekly/monthly/annually)

£ .

Workplace or Old Age Pensions (weekly/monthly/annually)

£ .

Long Term Care (LTC) benefit (weekly/monthly/annually)

£ .

Disability allowance (weekly/monthly/annually)

£ .

Income support (weekly/monthly/annually)

£ .

Other

Tell us more about these assets in the box below.

£ .

Tell us more about the assets that you refer to above

Section 5: Decisions in the next reporting period

Do you expect to make significant financial decisions on behalf of the Person in the next 12 months?

For example, the Person moving to other accommodation, buying or selling property or making adaptations to their home, changing their investments, making large gifts (such as a 21st birthday present for their child/grandchild).

Yes No

Section 6: Delegate Remuneration

Has the Court given permission for you to receive remuneration, and be paid out of the Person's estate, for acting as delegate?

Yes No

If Yes, what is the total estimated amount of remuneration that you anticipate you will charge for your first year as delegate?

£ .

Section 7: Delegate's declaration

I confirm that the information I have given in this report is true and correct to the best of my knowledge and belief. I understand that I have obligations to the Court and the Judicial Greffe and that if I knowingly provide false or misleading information there may be legal consequences.

I am signing this report on behalf of myself and each of the delegates named in the Act of Court (unless I have stated otherwise and provided reasons).

I confirm that I have had regard to the Capacity and Self-Determination (Jersey) Law 2016, its Code of Practice and the Act of Court in this case. I understand the duties and obligations placed upon me.

Delegate's signature

Print Delegate's name

Date

Check this box if you are not signing on behalf of all delegates (if there is more than one delegate) and tell us why below.

Once complete, return this form to:

The Probate and Protection Division, The Judicial Greffe, Royal Court House, Royal Square, St Helier JE1 1JG

Spare page (Use this page if you require more space to answer any of the questions within the report).

A large, empty rectangular box with a thin black border, occupying most of the page. It is intended for the user to provide additional answers or details if needed.