

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 441360.

**‘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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |

Delegate details The Person’s details

First names First names

|  |  |  |
| --- | --- | --- |
|  |  |  |

Last name Last name

|  |  |  |
| --- | --- | --- |
|  |  |  |

Address Address

|  |  |  |
| --- | --- | --- |
|  |  |  |
|  |
|  |
| Postcode |  | Postcode |

Telephone number Telephone number (optional)

|  |  |  |
| --- | --- | --- |
|  |  |  |

Email

|  |  |
| --- | --- |
|  |  |

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 scheme[[1]](#footnote-1)?**

Yes  No

**Are there any other charges[[2]](#footnote-2) 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 are available from the Judicial Greffe if required. Attach these to the Inventory).

Section 3:

Bank accounts that you manage on behalf of the Person

Account type Balance at the date of your

|  |
| --- |
|  |

Bank Name (current/savings) appointment as Delegate

|  |
| --- |
|  |

|  |  |  |  |
| --- | --- | --- | --- |
| £ |  | . |  |

Last 4 digits of the

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | - |  | - |  |

Branch Sort Code bank account number

|  |
| --- |
|  |

Account type Balance at the date of your

|  |
| --- |
|  |

Bank Name (current/savings) appointment as Delegate

|  |
| --- |
|  |

|  |  |  |  |
| --- | --- | --- | --- |
| £ |  | . |  |

Last 4 digits of the

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | - |  | - |  |

Branch Sort Code bank account number

|  |
| --- |
|  |

Account type Balance at the date of your

|  |
| --- |
|  |

Bank Name (current/savings) appointment as Delegate

|  |
| --- |
|  |

|  |  |  |  |
| --- | --- | --- | --- |
| £ |  | . |  |

Last 4 digits of the

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | - |  | - |  |

Branch Sort Code bank account number

|  |
| --- |
|  |

Account type Balance at the date of your

|  |
| --- |
|  |

Bank Name (current/savings) appointment as Delegate

|  |
| --- |
|  |

|  |  |  |  |
| --- | --- | --- | --- |
| £ |  | . |  |

Last 4 digits of the

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | - |  | - |  |

Branch Sort Code bank account number

|  |
| --- |
|  |

|  |
| --- |
| **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 or 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 adaptions 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. | |
|  |  | |

|  |
| --- |
|  |

What you need to do next

1. **Attach these documents to the Inventory:**

* Copy bank statements showing the account balances on the date of your appointment
* Copy investment statements showing the account balances on the date of your appointment
* Details of individual shareholdings held on the date of your appointment

1. **Submit the completed form and the attached documents to:**

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

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. [↑](#footnote-ref-1)
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. [↑](#footnote-ref-2)