CLERK'S OFFICE

Clarke County Circuit Court

102 North Church Street Berryville, Virginia 22611 Phone: 540-955-5116 Fax: 540-955-0284

APPLICATION FOR PROBATE APPOINTMENT CLARKE COUNTY CIRCUIT COURT APRIL WILKERSON-CLERK 540-955-5188 afwilkerson@vacourts.gov

FEES AND TAXES ARE DUE ON THE DAY OF YOUR APPOINTMENT

You must return this application to the Probate Division BEFORE setting your appointment along with the DEATH CERTIFICATE and ORIGINAL WILL (if applicable).

CHECKLIST: Items to bring to Probate Appointment

| ☐ Original Will and Codicils if applicable. The Clerk will retain these. |
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| ☐ Certified copy of the Death Certificate. This will not be returned. |
| ☐ Approximate value of any solely held asset(s). |
| □ Names, ages and addresses of Heirs-at-Law. Heirs-at-Law are the decedent's closest relatives; they may be different from the Will beneficiaries. |
| □ Valid photo identification. |
| □ Payment in the form of cash or check for Probate Tax and fees. |
| ☐ If you need to serve as the personal representative of the estate and you are not a Virginia resident, please bring a Virginia resident with you. |
| ☐ If the decedent died in a nursing home, please bring the address of the decedent's residence prior to entering the facility. |

DECEDENT INFORMATION Full name: Residential address at time of death: _____ Date of birth: _____ Date of death: ____ **APPLICANT INFORMATION** Full name: ____ Daytime phone number: _____ Email: _____ Relationship to the decedent: Is there a Will? Yes: Continue No: Continue to Executor/Administrator section WILL INFORMATION Dated: _____ Number of pages: _____ First named Executor: Phone number: _____ Email: _____ Second named Executor and/or Co-Executor: Phone number: _____ Email: ____ If a named Executor is unable or unwilling to qualify, they need to complete a waiver of qualification prior to the appointment. (Waiver is available at Clerk's Office.) **EXECUTOR/ADMINISTRATOR** Have you been convicted of a felony offense of (i) fraud or misrepresentation or (ii) robbery, extortion, burglary, larceny, embezzlement, fraudulent conversion, perjury, bribery, treason, or racketeering? YES NO

Both sections on this page must be completed if there is a Will.

If there is no Will, continue to the List of Heirs section.

LIST OF HEIRS

Heirs-at-Law are not necessarily the beneficiaries of the Will. Heirs-at-Law are determined by kinship to the deceased and are set by Virginia law. (VA code 64.2-200)

Order of Inheritance: You may stop listing heirs at whichever number fits your situation.

- 1. Surviving spouse and the children who are not biological/adopted children of surviving spouse but are children of deceased spouse only. If no surviving spouse, then proceed to No. 2.
- 2. All biological/adopted children of deceased. If no surviving spouse or surviving children, then list descendants of deceased children. If no living children or descendants of deceased children, then proceed to No. 3.
- 3. Parents of deceased. If no living parents, then proceed to No. 4.
- 4. Siblings of deceased and/or descendants of deceased siblings. If no living siblings or their descendants, then proceed to No. 5.
- 5. Nieces/nephews of deceased and/or descendants of deceased nieces/nephews.

If any heir is deceased, include the name and indicate (deceased).

NAME ADDRESS RELATION AGE

BENEFICIARIES NAMED IN WILL

List all NAMES and ADDRESSES for persons and/or organizations listed in the Will to receive a portion of the estate, even if they are listed as an heir.

REAL ESTATE

| Provide all addresses of real estate in the deceased's name. For please provide the assessed tax value. | properties located in Virginia, |
|--|---|
| 1 | : jointly held YES NO |
| 2 | : jointly held YES NO |
| 3 | : jointly held YES NO |
| 4 | : jointly held YES NO |
| Total Tax Assessed Value for Virginia real estate: | |
| ASSETS OF THE DECEDENT | |
| Personal assets in the decedents name only. Do not list accounts "survivorship," "payable on death," or "beneficiary" named prior to are Power of Attorney on accounts, that power ceases when the payable belisted as assets. If you are unsure about any of the aboundation holding the account to determine if the assets will go the need to be listed below. | the deceased passing. If you person dies, so those accounts ve situations, check with |
| bank accounts (checking, savings, etc.) stocks, bonds, CDs interests in any businesses brokerage firm accounts, life insurance, annuity, or retirem money or assets due deceased person from another estat personal contents of home (just estimation, not a detailed automobiles, boats, motorcycles, etc. cash monies | e |
| Description/Estimated Value (If you need more space, please a | ttach additional page.) |
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |

Total value of personal assets: