

CLERK'S OFFICE

Clarke County Circuit Court

102 North Church Street
Berryville, Virginia 22611
Phone: 540-955-5116
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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.
- 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: _____

Address: _____

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: _____

Address: _____

Phone number: _____ Email: _____

Second named Executor and/or Co-Executor: _____

Address: _____

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.

REAL ESTATE

Provide all addresses of real estate in the deceased’s name. For properties located in Virginia, please provide the assessed tax value.

- 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 and/or policies with “survivorship,” “payable on death,” or “beneficiary” named prior to the deceased passing. If you are Power of Attorney on accounts, that power ceases when the person dies, so those accounts should be listed as assets. If you are unsure about any of the above situations, check with institution holding the account to determine if the assets will go through the estate. If so, they need to be listed below.

- bank accounts (checking, savings, etc.)
- stocks, bonds, CDs
- interests in any businesses
- brokerage firm accounts, life insurance, annuity, or retirement plan payable to estate
- money or assets due deceased person from another estate
- personal contents of home (just estimation, not a detailed list)
- automobiles, boats, motorcycles, etc.
- cash monies

Description/Estimated Value *(If you need more space, please attach additional page.)*

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____

Total value of personal assets: _____