

ABBEVILLE COUNTY PROBATE COURT

WHEN THIS FORM IS COMPLETED, PLEASE CALL FOR AN APPOINTMENT-864-366-5312 X-62

Your appointment date/time is: _____

INFORMATION THE COURT NEEDS FOR OPENING AN ESTATE (ADD'L. INFO MAY BE NEEDED).

IMPORTANT NOTE: If the decedent left a **WILL**, bring the **original** to the Court upon your initial visit.

NAME OF DECEASED: _____

1. Death Certificate
2. After payment of funeral bill, you must furnish the Court with a copy marked "Paid-in-Full".
3. Upon opening the estate, you will need to pay \$45.00 to the Press & Banner. This payment will cover the cost of publication of the Legal Notice to Creditors.
4. Court costs will be assessed in accordance with the South Carolina Probate Fee Schedule and are due and **payable no later than 90 days after opening the Estate.**
5. If in your possession, bring titles to the real property. All **real estate** that the decedent owned, jointly or entirely, must be declared. The Court will get the tax-assessed value and you will then appraise the property yourself.
6. Will – bring **original Will, it must be filed with the Court.**

INFORMATION NEEDED FOR THE APPOINTMENT OF A PERSONAL REPRESENTATIVE:

- Name of Applicant/Petitioner: _____
- Address: _____

- Telephone Number (Home) _____ (Office) _____
- List beneficiaries under the Will (persons to actually receive from the estate as stated in will).

<u>Name</u>	<u>Date of Birth</u>	<u>Address</u>	<u>Relationship</u>

(If additional space is needed, use separate sheet)

- List Heirs-at-law (anyone who would have inherited if decedent had not left a Will). For example, if all is left to the spouse, you need to list the children of decedent and if applicable, children of a pre-deceased child or children of decedent, their dates of birth and their addresses:

<u>Name</u>	<u>Date of Birth</u>	<u>Address</u>	<u>Relationship</u>

(If additional space is needed, use separate sheet)

INVENTORY AND APPRAISAL INFORMATION

A. **Real Estate:** List address, acreage, buildings; if not solely owned by the decedent list the other owner (s).

<u>Property</u>	<u>Location</u>	<u>Owners</u>	<u>Appraised Value</u>

B. List all **stocks and bonds** (in decedent's name only):

<u>Name of Stock</u>	<u>No. of shares</u>	<u>Face value at date of death</u>	<u>Total value</u>

C. List cash on hand and the balances in bank accounts that the decedent held in his or her name alone:

<u>Name of Bank or entity</u>	<u>Amount</u>	<u>Name of Company</u>	<u>Amount</u>

The following questions determine if you are eligible for the capital credit refund these co-ops pay.

- Was West Carolina Telephone Co-op the telephone company that the decedent used? Yes ___ No ___
If yes, what was the decedent's phone number: _____
- Was Little River Electric Co-op the power company the decedent paid for electricity? Yes ___ No ___

D. Money due the decedent from mortgages or notes:

E. List **Life Insurance payable to the Estate** (carrier and payoff amount):

<u>Carrier/Name of Ins. Co.</u>	<u>Beneficiary</u>	<u>Amount Received</u>

F. **Jointly owned property** with right of survivorship. Bank accounts/CD's, stocks, bonds, etc. List showing amount in bank as near to decedent's date of death as may be estimated:

<u>Name of Bank or Institution</u>	<u>Joint Names on the Account (and relationship)</u>	<u>Balance</u>

G. **Miscellaneous Personal Property** – list other property the decedent owned such as mobile homes, vehicles, boats and motors, tools, farm machinery, livestock, farm products, guns, household furnishings, personal effects, coins, china, stamp collections or similar collections, jewelry. You must set a **value** on each vehicle, mobile home, boat, etc. If in your possession, bring titles to mobile homes and vehicles (or registration cards) with you when you keep your appointment.

<u>Property</u>	<u>Value</u>

H. Transfers intended to take effect at death (Life estate in real property, bonds “payable on death”):

I. Trusts created retaining unto self income for life, power to revoke or other incidents of ownership:

J. Annuities (IRAs, Keoghs, Retirement Plans):

<u>List Beneficiaries</u>	<u>Value</u>

K. Encumbrances – list mortgages, etc. that decedent owed. List specific assets encumbered (e.g. home, vehicle) and the amount of the balance:

<u>Mortgage or Loan Company</u>	<u>Item mortgaged/reason for debt</u>	<u>Amount owed</u>

ANY INFORMATION THAT CANNOT BE OBTAINED BY YOU WITHOUT A CERTIFICATE OF APPOINTMENT may be furnished to this Court after the estate is opened.

We are here to minimize any inconveniences that you may experience in the process of complying with this legal obligation. Please feel free to contact the Court should you have concerns or problems with the probate of this estate.

C. MARK SUMNER, JUDGE OF PROBATE
 Post Office Box 70
 Abbeville, South Carolina 29620