

INFORMATION NEEDED FOR OPENING AN ESTATE

We look forward to helping you with the estate. To begin the process, please mail or hand-deliver this form and the following items to the Madison County Circuit Court Clerk's Office. Address: 1 Main Street, P.O. Box 220, Madison, VA 22727 (540) 948-6888

- Death Certificate
- Original Will and Codicil – A copy cannot be put to record without Court approval; If an original will cannot be located, you will need to seek legal counsel.
- If no will, please check here
- Names and Addresses of all beneficiaries in will – a beneficiary is a person or organization who is named in the will to receive a portion of the estate.

(if necessary, continue on reverse)

- Names and Addresses of all heirs – heirs are persons who would inherit the decedent's estate if the deceased left no will (examples are: wife, children – including children from a previous relationship and from current relationship (if there are children from a previous relationship, heirs would include wife and all children), mother, father, siblings, etc.

****A LIST OF HEIRS IS REQUIRED TO BE PUT ON RECORD EVEN IF THERE IS A WILL****

<u>Full Legal Name</u>	<u>Full Current Address</u>	<u>Relationship to Deceased</u>	<u>Age</u>

(if necessary continue on reverse)

- Probate Information Form filled out (see attached)
- List of Assets filled out (see attached)

APPOINTMENT: After you have delivered the above listed information to the Clerk's Office, we will contact you to set up a mutually convenient time to have you come to the office to complete the process.

COSTS: Be prepared to pay the probate tax and costs at the time of your appointment. If you wish, you may ask for an estimate prior to the appointment.