

## **INFORMATION NEEDED FOR OPENING AN ESTATE**

The Madison County Circuit Court extends our heartfelt condolences on the passing of your loved one and 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. Our address is:

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 there is no will, please check here
- Names and Addresses of all beneficiaries in the will – a beneficiary is a person or Organization who is named in the will to receive a portion of the estate

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(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. §64.2-200

**\*\*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>
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(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.

It is recommended that the family seek advice of counsel if there is the possibility of repossession of a vehicle, foreclosure of a home or a Reverse Mortgage. The Madison County Circuit Court Clerk's Office cannot give legal advice. It is always best to consult with your legal representative, accountant, financial advisor before qualification.