FAIRFIELD COUNTY PROBATE COURT
ESTATE WORKSHEET

Purpose: To provide the Probate Court with information concerning the assets of the decedent in order to determine what type of estate proceeding is necessary.

Notice: This is only a worksheet. If there is not enough space for your information, attach a standard 8 ½ x 11 sheet of paper to this worksheet. Complete in black ink.

DECEDENT'S NAME: _____

DECEDENT'S ADDRESS AT DEATH: _____

DECEDENT'S DATE OF DEATH: _____

YOUR NAME: _____

YOUR ADDRESS: _____

_____

EMAIL: _____

YOUR DAYTIME TELEPHONE NUMBER: _____

YOUR RELATIONSHIP TO DECEDENT: _____

Did the decedent have a Will: _____ Yes _____ No
If so, who is named as the Primary Personal Representative? _____
If the person named as the Primary Personal Representative is deceased, is there an Alternate Personal Representative named in the Will? _____
If different from the person completing this form, please list his/her name, address, and phone number. _____

GENERAL INFORMATION

Steps to open an estate with Fairfield County Probate Court:

1) Complete the Fairfield County Probate Court Estate Worksheet
2) Gather "Required Documents" listed below
3) Call Probate Court to schedule your appointment
4) Complete necessary forms at your appointment with the assistance of Court staff

Small Estate Administration/Collection of Personal Property: Decedent did not own real estate property and probate assets total under $45,000. This cannot be filed with the Court until 30 days after the decedent's death.
Court Fee: $25.00 For estate property less than $100 value: $12.50

Informal Probate of Will Only: Decedent executed a will but there are **no probate assets** to transfer. Per state law, a will should be filed with the Probate Court within 30 days of the decedent's death.
Filing of Will Only: $10.00

Informal Probate of Will and/or Personal Representative Appointment: Decedent owned real estate and/or total value of probate assets are over $45,000.
Personal Representative Appointment: $25.00

Formal Estate Administration: Decedent owned real estate and/or total value of probate assets are over $45,000.The original will is not available; and/or interested parties are not in agreement about who will be Personal Representative. To proceed with a formal action/lawsuit, you should hire an attorney for assistance.
Filing Fee: $150.00

- Per State Law, based on the value of the estate, additional fees must be collected before the estate administration can be closed.
- Fairfield County Probate Court only accepts cash, check, or money order payment. Checks or money orders should be made payable to Fairfield County Probate Court.
- Fairfield County Probate Court is prohibited from giving legal advice.
- Publication fee when required: $50.00 made payable to The Voice

ASSET INVENTORY

List ALL property owned by the decedent at the time of his/her death and the value at the time of death. The instructions below indicate what type of information is required to be listed.

Real Estate Give the location (Street/City/County/State.) If there is a mobile home on the property, list it separately below. List the Fair Market Value. Property includes all assets titled in the decedent's name alone or assets titled jointly with another person as tenants in common. This does not include property titled jointly with right of survivorship. You will need to check carefully to determine if joint property is considered "with right of survivorship." If you are unsure, please list the property and submit the additional documentation.
Please specify if there are outstanding liens.

Description/Address: Value:
_____ _____
_____ _____
_____ _____

Stocks and Bonds List name of Company and the value.

Company: Value:
_____ _____
_____ _____

Bank Accounts List the name of the financial institution, the type of account and the balance in the account.

Bank Name and Account type (Checking, Savings, CD): Balance:
_____ _____
_____ _____
_____ _____

Life Insurance List the name of the insurance company and the amount of the policy **if** there is no beneficiary named or if the beneficiary is deceased.

Insurer: Value:

_____ _____

_____ _____

Vehicles, mobile homes or boats List the year, make and model and value. **Please specify if there are outstanding liens.**

Description: Value:

_____ _____

_____ _____

_____ _____

Annuities, retirement, 401-Ks or IRAs List the type of account, name of the company and the value **if** there is no beneficiary named or if the beneficiary is deceased.

Company and Account Type (Annuity, 401k, IRA): Balance:

_____ _____

_____ _____

ESTATE HEIRS AND DEVISEES

List the names, complete mailing addresses (and year of birth for minors) of any other persons named in the decedent's Will along with their relationship to the decedent.
*****Please attach to worksheet if needed*****

_____

_____

LIST THE DECEDENT'S RELATIVES: If none or deceased, so indicate and list date of death if known.

Decedent's spouse: List name and complete mailing address

_____

Decedent's children still living: List name, complete mailing address (and year of birth for minors). (This list is required either with or without a Last Will & Testament)

_____

_____

_____

_____

Children predeceasing decedent: List name, complete mailing address (and year of birth for minors) of his/her children. (This list is required either with or without a Last Will & Testament)

_____

_____

***Attach list for additional predeceased children and their descendants (if applicable).**

If you answered "NONE" to all of the previous questions about relatives, list the decedent's parents:

Mother's name: _____ Deceased? _____
Address: _____
Father's name: _____ Deceased? _____
Address: _____

If you answered "NONE" to all of the questions about relatives and both parents or all persons listed are deceased, please list the names and addresses of the decedent's siblings. If the decedent's siblings are deceased, list the names and addresses of the deceased sibling's children. * Please attach to worksheet if needed.**

LITIGATION

***If there are no assets** and an estate is being opened for ***Litigation** (lawsuit) purposes, state what type of litigation you intend to pursue:

_____

***Litigation** You must provide the Court with copies of the latest correspondence, court filings, etc. concerning the litigation.

Name of Attorney _____
Address _____
City, State, Zip _____
Phone Number _____

REQUIRED DOCUMENTS

THE FOLLOWING DOCUMENTS, ALONG WITH THIS COMPLETED WORKSHEET, WILL NEED TO BE BROUGHT TO YOUR APPOINTMENT TO OPEN THE ESTATE FOR ADMINISTRATION:

- **Certified copy of the death certificate**
- **Decedent's ORIGINAL Last Will and Testament and any Codicils and Memorandums**
- **Copy of the obituary or funeral program listing the surviving family members**
- **Copy of all Deeds for real property that decedent owned an interest in. (For Small Estate Affidavits, copy of documents showing what small estate is needed for. IE: car title, capital credits letter, check, etc)**
- **Copy of paid funeral bill SHOWING WHO PAID**

- **Renunciation forms, if applicable –** if the Primary Personal Representative named in the Will is not going to serve or if the person with priority in an estate without a Will is not going to serve, these forms will be **required** to be filed at the time of your appointment. Form #302. *All heirs will need to sign this form if applicable.

- **Financial Statements (Bank, Retirement, Stocks, etc.)**

After gathering all required documents, contact Probate Court Staff to schedule your appointment. Opening appointments may last one hour or more. Please call our office at 803-712-6519 if you have any questions about completing this worksheet or about the estate administration process.

Office location:	**Fairfield County Probate Court** **Main Courthouse, First Floor** **P. O. Box 385 (Mailing Address)** **Winnsboro, SC 29180** **101 S. Congress Street (Physical Address)** **Winnsboro, SC 29180**
Telephone Number:	**803-712-6519**
County Website:	**www.fairfieldsc.com**
Forms Website:	**www.sccourts.org**