

PROBATE PRE-APPOINTMENT WORKSHEET

To obtain an appointment, please complete the information in this package.

Return the information by: mail or hand carry to the front counter (Clerk of Circuit Court, Attn: Probate, Room 314, 9311 Lee Avenue, Manassas, VA 20110); fax (703-792-7750); or e-mail circuitcourt@pwcgov.org.

Do not send the last 2 pages. You will need them when the Probate Clerk calls you.

Within 2 days of receipt, a probate clerk will call to discuss what was sent and to set up an appointment, if needed.

Date

Total # of Pages (including this page)

Included are:

- General Information Worksheet
- Estate Asset Worksheet
- Copy of Will and Codicil(s) (Do not send original)
- Copy of Death Certificate (Do not send original)
- Other

Note: If you are unclear about a question, don't worry; just do the best you can. A Clerk will clarify when calling you.

GENERAL INFORMATION WORKSHEET

Name of person making request

Mailing Address

Phone #s: home _____ ; work _____ ; cell _____

E-Mail _____

Name of assisting attorney (if any)

Attorney's mailing address

Phone # _____ E-Mail _____

Why requesting appointment

- Appointment as executor of will
- Appointment as administrator of estate
- Appointment as curator
- Probate of will
- Other

Decedent's (Person who is deceased) Full Name

Decedent's Residence address at time of death

Street _____ City _____, State _____

If the above is a nursing home, previous residence address

Street _____ City _____, State _____

Date of birth _____

Date of death _____ Place of death _____

Decedent died with a will without a will

Date of will (and codicils) _____

Full names of named executors of will _____

At the time of death was the decedent Married? Single? Divorced? Widowed?

List of Heirs at Law

The heirs at law are not necessarily the beneficiaries of the will. Heirs at law are determined by kinship to the deceased and are set by Virginia law. ([VA Code 64.2-200](#)). If an heir is deceased, include his/her name and indicate (deceased) and also list his/her heirs.

Full Name (First, Middle, Last)	Address	Relationship	Age

ESTATE ASSET WORKSHEET

Did the decedent own in his/her name ONLY (or as tenants in common) any real estate in Prince William, Manassas, and/or Manassas Park? yes no

Did the decedent own in his/her name ONLY (or as tenants in common) any real estate elsewhere in Virginia? yes no

Did the decedent own in his/her name ONLY (or as tenants in common) any real estate outside of Virginia? yes no

Include assets that are in the DECEDENT'S NAME ONLY.

Do NOT include property held jointly with a right of survivorship or assets payable to a named beneficiary (e.g., life insurance policies with a named beneficiary) or assets in a trust or assets payable on death.

Asset	Value as of Date of Death
Checking Accounts	\$
Savings Accounts	
Money Market Accounts	
Certificates of Deposit	
Mutual Funds	
Investment Accounts	
Stocks	
Bonds	
Life insurance payable to the Estate (not person)	
Business Owned by Decedent	
Accounts Receivable	
Inheritance due the Decedent	
Annuities	
Trust Income	
Pension Income	
Other Securities	
Miscellaneous Cash	
Household Furnishings	
Personal Items	
Cars, Trucks	
Boats, Trailers, RVs	
Subtotal – Personal Property	
Real Estate in Prince William, Manassas, Manassas Park	
Real Estate Elsewhere in Virginia	
Subtotal – Real Property	

DO NOT SEND WITH YOUR WORKSHEET
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Name of Probate Clerk _____
Phone #: 703-792-5587 _____ E-Mail: circuitcourt@pwcgov.org

Appointment Date _____ Time _____

Location: Judicial Center, 9311 Lee Avenue, 3rd floor, Manassas, VA 20110

You cannot bring in a cell phone that takes pictures nor food nor drink.

You will go through security and then take the elevator to the 3rd floor.

Go to the information desk or if no one is there, go to room 314.

The appointment will take place in the conference room next to room 300.

You will need to bring with you to the appointment (the Clerk will tell you what to check):

- Current picture ID of person who is going to qualify
- Original Will and Codicil(s). Please note that the Clerk's Office must retain the original Will and Codicil(s)
- Death Certificate of the Decedent. Must be a certified copy with a raised seal. If a named executor or an heir who has first right to qualify is deceased, a certified copy of his/her death certificate is required.
- Original Deposition(s). If the Will or Codicil is not self-proving (see www.pwcgov.org/probate) or if the Will is holographic (handwritten), then depositions from witnesses and/or the notary are required. (There is a form.)
- Original Waiver(s). Waivers of qualification will need to be provided if an executor names in a Will or Codicil, or an heir that has the first right of qualification desires to waive his/her right to qualify as an executor of administrator. (There is a form.)
- Bondsman for Surety Bonds. If surety is required on your fiduciary bond, you will need to arrange for a bondsperson to be present at your designated appointment. You may request a list of know bondsmen from the Clerk's Office to assist you in obtaining the bondsman of your choice.
- Appointment of Resident Agent. All non-resident fiduciaries must appoint an in-state resident to serve as resident agent to accept service of process or other notices on behalf of the estate. Prior to being appointed as resident agent, this individual must consent to the appointment in writing.
- Notarized renunciation of executor named in will who does not wish to serve.
- If, within 30 days from date of death, consent of all heirs at law who do not wish to qualify.
- Other

Note: Forms are available at www.courts.state.va.us/forms/circuit/fiduciary.html or in the Clerk's Office All forms must be notarized unless signed in the presence of a Deputy Clerk.

DO NOT SEND WITH YOUR WORKSHEET
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- Payment. Check or Cash is required for the Probate Fees. Debit and credit cards are not accepted. The exact amount will be determined at the probate appointment. Payment is due at the time of the appointment.

Fees, Taxes and Costs:

State Probate Tax	\$.001 x value of probate assets
Recordation of Will	10 or fewer pages \$16 11 to 30 pages \$30 31 or more pages \$50 Includes 1 copy of Certification of Qualification/Clerk's Order
Recordation of List of Heirs	\$16
Transfer Fee	\$1 per parcel (only if real estate involved)
Clerk's Fee	Sliding scale Estates not exceeding \$50,000 -- \$20 Estates not exceeding \$100,000 -- \$25 Estates exceeding \$100,000 -- \$30
Certification of Qualification	\$2 each (one already included in Recordation of Will fee)