

RICHLAND COUNTY PROBATE COURT WORKSHEET

This worksheet should be completed BEFORE your interview with Court personnel. If this form has not been completed, Court Personnel cannot determine if you will need legal assistance or if you can handle the estate yourself.

(Remember, it may be necessary to call 576-1961 to reschedule an appointment, if you have not completed the required forms.)

A. REAL ESTATE (IN STATE AND OUT OF STATE)

LOCATION (Street/City/State)	Owner's Name	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

CEMETARY PLOT(S) (Owned by decedent)
 Location: _____

B. STOCKS, BONDS (in decedent's name alone)

Stocks: _____

Bonds: _____

C. CASH, BANK ACCOUNTS*, NOTES (BEING PAID TO DECEDENT)

*Bank accounts with "or" - See Schedule E.

Cash on hand? yes ___ no ___ If yes, amount: \$ _____
 Paycheck? yes ___ no ___ If yes, amount: \$ _____
 From: _____ Payable to: _____
 Refund checks? yes ___ no ___ If yes, amount: \$ _____
 From: _____ Payable to: _____
 From: _____ Payable to: _____
 Mortgage due decedent? yes ___ no ___ If yes, amount: \$ _____
 From: _____
 Inheritance to be received by decedent: yes ___ no ___ Describe: _____

	Bank/Company Name	Amount
Checking account(s): _____		

Savings account(s): _____

C. D.(s): _____

Other (list): _____

D. PART 1 - INSURANCE PAYABLE TO THE ESTATE:

Company Name & Policy Number	Face Value
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PART 2 - INSURANCE PAYABLE TO BENEFICIARY:

Beneficiary Name	Company Name & Policy No.	Face Value
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E. JOINTLY OWNED PROPERTY (With Right of Survivorship)

Exact Names on Account	Bank/Company Name	Amount
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Checking
Account(s): _____

Certificate(s)
Of Deposit: _____

Stocks: _____

Bonds: _____

Real Property: _____

(Bring copy of Deed)

Other (list - vehicles, etc.): _____

F. MISCELLANEOUS

Household Goods & Furnishings: _____

	Exact name on Title	Year/Model	Value
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Vehicles (auto, etc.): _____

Boat, motors, and Trailers: _____

Mobile Homes: _____

Farm Equipment: _____

Description	Approximate Value
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Business owned: _____

Jewelry (of value): _____

Collectibles: _____

Other (list): _____

G. TRANSFERS DURING DECEDENT'S LIFE

Beneficiary	Value
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Trust: _____

Life Estate: _____

Savings Bonds (POD): _____

Other (list): _____
