

## PROBATE PRE-APPOINTMENT WORKSHEET

To obtain an appointment, please complete the information in this package.  
Please return the information worksheet by: mail to 9311 Lee Avenue, Room 312, Manassas, VA  
20110; fax (703-342-0342); or e-mail [probate@pwcgov.org](mailto:probate@pwcgov.org).

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

Probate matters are processed in the order received. A probate clerk will call to discuss what was sent and to set up an appointment, if needed. If you provide an email address, we will confirm receipt of your worksheet.

Date \_\_\_\_\_

Total # of Pages (including this page) \_\_\_\_\_

Please include with this paperwork the following:

- 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 \_\_\_\_\_

**Please do not submit the Probate Pre-Appointment Worksheet until it is completed in full to the best of your ability.**

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

## GENERAL INFORMATION WORKSHEET

Name of person making request \_\_\_\_\_  
Home Address \_\_\_\_\_  
Mailing Address (if different) \_\_\_\_\_  
Phone #s: home \_\_\_\_\_; work \_\_\_\_\_; cell \_\_\_\_\_  
E-Mail \_\_\_\_\_

Name of assisting attorney (if any) \_\_\_\_\_  
Attorney's mailing address \_\_\_\_\_  
Phone # \_\_\_\_\_ E-Mail \_\_\_\_\_

Please check whichever applies as to the reason an appointment is being requested:

\_\_\_\_\_ 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 address is a nursing home, please provide the previous residence address  
Street \_\_\_\_\_ City \_\_\_\_\_, State \_\_\_\_\_

Date of birth \_\_\_\_\_  
Date of death \_\_\_\_\_ Place of death \_\_\_\_\_  
Decedent died \_\_\_\_\_ with a will or \_\_\_\_\_ without a will  
Date of will \_\_\_\_\_ (and date of codicils, if any) \_\_\_\_\_

Full names of executors named in will \_\_\_\_\_

At the time of death the decedent was: \_\_\_\_\_ 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 list his/her heirs. For additional space, please see the last page of this document.

[illegible]

### List of Heirs at Law Continued

[illegible]

## 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	
Other	
Total - Personal Property	
Real Estate in Prince William, Manassas, Manassas Park	
(Please list address):	
Real Estate elsewhere in Virginia	
(Please list name of County):	
Total – Real Property	

**DO NOT SEND WITH YOUR WORKSHEET**  
**THIS IS FOR YOUR USE WHEN PROBATE CLERK CALLS (Page 1 of 2)**

Name of Probate Clerk \_\_\_\_\_  
Phone #: 703-792-5587 E-Mail: [probate@pwcgov.org](mailto:probate@pwcgov.org)

Appointment Date \_\_\_\_\_ Time \_\_\_\_\_

Location: Judicial Center, 9311 Lee Avenue, Room 312, Manassas, VA 20110

- You cannot bring in any food nor drink.
- You will go through security and then take the elevator to the Lower Level.

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 Depositions(s). If the Will or Codicil is not self-proving (see [www.pwcgov.org/probate](http://www.pwcgov.org/probate)) or if the Will is holographic (handwritten), then two (2) depositions from disinterested witnesses are required. (There is a form.)
- Original Waiver(s). Waivers of qualification will need to be provided if an Executor named in a Will or Codicil or, if there is no Will, an Heir at Law that has the first right of qualification, desires to waive his/her right to qualify as an Executor or 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 known 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](http://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.

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- **Payment.** We accept payment in the form of Check, Cash, or Credit/Debit cards for the Probate fees. The credit cards we accept are Visa, MasterCard, or Discover. If paying by credit or debit card, there will be an additional fee of either \$2.00 or 3%, whichever is greater. 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 \$18 11 to 30 pages \$32 31 or more pages \$52 (includes 1 copy of Certification of Qualification/Clerk's Order)
Recordation of List of Heirs	\$18
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)