

Winchester Circuit Court
ASSETS OF THE ESTATE OF _____

If possible, we request that you email this document to our offices prior to your appointment in order to make your visit more efficient at this difficult time. Please send the email to Terry Whittle at twhittle@courts.state.va.us or Anne Redmon at aredmon@courts.state.va.us and include this worksheet (please be sure to scan both the front and back of the document). All information will be kept confidential and private.

Name of Deceased: _____
First Middle Last

Date of Death: _____ Place of Death: _____
City/State

Date of Birth: _____

Social Security Number of Deceased: _____

Marital Status: _____ Single _____ Married _____ Divorced _____ Widowed

1. Is there a Will? YES _____ NO _____

2. Did the deceased own any real property in this state? YES _____ NO _____

PROPERTY ADDRESS - _____

3. Did the deceased own any real property located outside this state? YES _____ NO _____

LOCATION OF THE PROPERTY - _____

4. Did the deceased own any of the following? Circle YES or No for each item listed below; if YES please provide approximate value.

Stocks	YES	NO	\$ _____
Bonds	YES	NO	\$ _____
Investment Accounts	YES	NO	\$ _____
Savings Bonds	YES	NO	\$ _____
Mutual Funds	YES	NO	\$ _____
Money Market Accounts	YES	NO	\$ _____
Certificates of Deposit	YES	NO	\$ _____
Savings Accounts	YES	NO	\$ _____
Checking Accounts	YES	NO	\$ _____
Notes Receivable	YES	NO	\$ _____
Accounts Receivable	YES	NO	\$ _____
Pension Income	YES	NO	\$ _____
Annuity	YES	NO	\$ _____
Trust Income	YES	NO	\$ _____
Other Securities, etc.	YES	NO	\$ _____
Miscellaneous Cash	YES	NO	\$ _____

5. Did the deceased have any insurance on his/her life? YES ___ NO ___

BENEFICIARY NAMES - _____

4A. Is the life insurance payable to the decedent's estate? YES ___ NO ___

DEATH BENEFIT PAYMENTS - \$ _____

6. Was the deceased engaged in business as either a sole proprietor, partner, limited partner, or corporate partner? YES ___ NO ___

DESCRIBE BUSINESS INTEREST - _____

VALUE OF INTEREST - \$ _____

7. Did the deceased have an interest in any other estate or trust which had not been distributed to him/her prior to death? YES ___ NO ___

DESCRIBE THE ESTATE/TRUST INTEREST - _____

VALUE OF INTEREST - \$ _____

8. Did the deceased own any automobiles, boats, trailers or similar vehicles? YES ___ NO ___

MAKE _____ MODEL _____ YEAR _____ VALUE \$ _____
CO-OWNER? YES ___ NO ___ NAME - _____
MAKE _____ MODEL _____ YEAR _____ VALUE \$ _____
CO-OWNER? YES ___ NO ___ NAME - _____
MAKE _____ MODEL _____ YEAR _____ VALUE \$ _____
CO-OWNER? YES ___ NO ___ NAME - _____

9. Please provide the value of the personal effects and household furnishings owned by the deceased, including items specifically given away in the will of the deceased.

PERSONAL PROPERTY VALUE - \$ _____

APPRAISED ANTIQUES VALUE - \$ _____

APPRAISED, ANTIQUE JEWELRY - \$ _____

10. Who are the potential Heirs at Law:

NAME: _____ ADDRESS: _____
NAME: _____ ADDRESS: _____
NAME: _____ ADDRESS: _____
NAME: _____ ADDRESS: _____
NAME: _____ ADDRESS: _____