



Probate Court of Oconee County, S.C.

Danny Singleton, Judge

INFORMATION PACKET FOR ESTATE MATTERS

First and foremost, please accept our sincerest condolences on the loss of your loved one. Enclosed you will find our information worksheet. Please complete questions to the best of your ability. If you simply have no answer for the question, please write "N/A". You can return all required documents using mail services or you can drop off all documents at the Office of Probate Court during the business hours of 8:30am to 5:00pm, Monday through Friday.

Required Documents Check List:

- ___ Completed Information Packet
- ___ **Original** Last Will and Testament (if available)
- ___ Certified Death Certificate (**CANNOT ACCEPT A COPY**)
- ___ Copy of the Paid Funeral Bill/Invoice for Funeral Bill
- ___ Copy of Deed for any and all Real Property
- ___ Copy of any vehicle, boat, or motor title(s) (with value)
- ___ Copy of any bank statements for accounts **not** jointly owned with survivorship.
- ___ Proof of ownership for any life insurance policies, stock/bonds, IRA's etc.
(*Made payable to the estate, that do not have beneficiaries/are not POD*)
- ___ Copy of Petitioner's Photo ID

When we receive all these documents back, we will process them accordingly by assigning you a case worker. The case worker will then get back in contact with you for the next steps shortly thereafter. Thank you, and please call us if you have any questions. We send you our kindest regards in these difficult times.

Sincerely,

Oconee County Probate Court

Please fill out this form in its ENTIRETY in order for our court to accept it.

TODAY'S DATE: _____

PETITIONER'S INFORMATION:

YOUR NAME: _____

YOUR FULL ADDRESS:

PHONE #: (HOME): _____ (CELL): _____

EMAIL ADDRESS: _____

*YOUR RELATIONSHIP TO THE DECEDENT: _____

DECEDENT'S INFORMATION:

NAME OF DECEDENT: _____

DATE OF DEATH: _____

COUNTY AND STATE OF RESIDENCE OF THE DECEDENT AT THE TIME OF DEATH:

1. DID THE DECEDENT HAVE A WILL? _____ YES _____ NO

*(if yes, you **MUST SUBMIT THE ORIGINAL!!** The court WILL NOT accept a copy)*

2. WHO IS NAMED AS PERSONAL REPRESENTATIVE IN THE WILL?

3. WAS THE DECEDENT MARRIED AT THE TIME OF DEATH?

_____ YES _____ NO

NAME OF SPOUSE: _____

PHONE NUMBER: _____

4. DID THE DECEDENT HAVE ANY LIVING CHILDREN? _____ YES _____ NO

(If yes, please list all children above the age of eighteen (18) below along with their current address (This includes all biological and legally adopted children.)

1. _____
2. _____
3. _____
4. _____
5. _____

5. ARE ANY OF THE **LIVING CHILDREN MINORS**? _____ YES _____ NO

(If yes, please list all minor children below with their current address (This includes all biological and legally adopted children.)

1. _____
2. _____
3. _____
4. _____

6. DID THE DECEDENT HAVE ANY **DECEASED** CHILDREN? _____ YES _____ NO

(If yes, please list all deceased children below.)

1. _____
2. _____
3. _____
4. _____
5. _____

*DID ANY DECEASED CHILDREN OF THE DECEDENT HAVE CHILDREN? __ YES __ NO

(IF YOU CHECKED YES TO QUESTION FIVE (5) PLEASE LIST THEIR CHILDREN BELOW:

1. _____
2. _____
3. _____
4. _____

7. ARE THE DECEDENTS PARENTS STILL LIVING? _____ YES _____ NO
(If yes, please list their names and current address)

1. _____
2. _____

IF NO, PLEASE LIST ANY LIVING SIBLINGS (NAME AND ADDRESS) OF THE DECEDENT BELOW

1. _____
2. _____
3. _____
4. _____
5. _____

ASSET INFORMATION:

DID THE DECEDENT OWN ANY OF THE FOLLOWING:

1. REAL ESTATE? _____ YES _____ NO

(If yes, please list any and ALL property below along with the addresses.)

1. _____
2. _____
3. _____
4. _____
5. _____

*** If the Decedent owned property, please provide our office with a copy of the deed for each property.**

IS ANY OF THE PROPERTY LISTED ABOVE CONSIDERED JOINT WITH THE RIGHTS OF SURVIVORSHIP OR A LIFE ESTATE? _____ YES _____ NO

(If you are not sure, you can obtain this information from the property deed)

(If you answered yes, please list that property below along with the address.)

1. _____
2. _____
3. _____
4. _____
5. _____

2. BANK ACCOUNTS? _____ YES _____ NO

If yes, are the accounts joint with anyone? _____ YES _____ NO

***(Please provide our office with the latest bank statement)**

3. SAFE DEPOSIT BOX? _____ YES _____ NO

If yes, is the safe deposit box joint with anyone? _____ YES _____ NO

4. STOCKS OR BONDS? _____ YES _____ NO

If yes, were these transferable on death/ payable on death? _____ YES _____ NO

5. VEHICLES? _____ YES _____ NO

If yes, are the vehicles listed in the decedent's name alone? _____ YES _____ NO

If the vehicle is jointly owned, please **CIRCLE** whether the title is listed: **AND / OR** in between owner's names.

6. BOATS? _____ YES _____ NO

If yes, are the boats listed in the decedent name alone? _____ YES _____ NO

If the boat is jointly owned, please **CIRCLE** whether the title is listed: **AND / OR** in between owner's names.

7. MOTORS? _____ YES _____ NO

If yes, are the motors listed in the decedent name alone? _____ YES _____ NO

If the motor is jointly owned, please **CIRCLE** whether the title is listed: **AND / OR** in between owner's names.

8. LIFE INSURANCE? _____ YES _____ NO

*(If yes, is this payable to the **ESTATE** or to a **BENEFICIARY**? (CIRCLE ONE)*

9. HAS THE FUNERAL BEEN PAID IN FULL? _____ YES _____ NO

IF SO, WHO PAID? _____

(If yes, please include a paid funeral bill receipt with this paperwork. If the funeral bill is NOT yet paid in full, please provide our office with an invoice from the funeral home)

10. WILL THIS ESTATE BE INVOLVED IN LITIGATION? _____ YES _____ NO

I UNDERSTAND THAT THERE IS A \$25.00 FEE TO OPEN AN ESTATE CASE. I ALSO UNDERSTAND THAT IN A FULL ESTATE (REAL PROPERTY-REGARDLESS OF VALUE OR THE ESTATE IS VALUED AT MORE THAN \$45,000.00) THERE IS A NOTICE TO CREDITOR FEE OF \$417.00. THIS FEE IS PAID AT PROBATE AND SENT TO THE JOURNAL (LOCAL NEWSPAPER) FOR THE NOTICE TO CREDITOR TO RUN. THIS IS NOT A PROBATE FEE AND THE COURT DOES NOT HAVE ANY CONTROL OVER THIS AMOUNT. FEES VARY FOR ESTATES VALUED UNDER \$45,000.00.

PAYMENT IS NOT DUE WHEN TURNING IN THIS PACKET, BUT WILL BE DUE DURING THE APPOINTMENT PROCESS. A BREAKDOWN OF ALL FEES CAN BE FOUND AT OUR WEBSITE OCONEESC.COM/PROBATE-HOME

I UNDERSTAND,

APPLICANT

DATE