

SMALL ESTATE **ASSIGNMENT OF PROPERTY**

**PLEASE NOTE THAT THE COURT IS NOT ALLOWED TO GIVE LEGAL ADVICE
OR HELP YOU FILL OUT THESE FORMS.
IF YOU NEED ASSISTANCE, PLEASE CONSULT AN ATTORNEY.**

FORMS INCLUDED IN THIS PACKET

- Petition for Assignment (PC 556)
- Protected Personal Identifying Information (MC 97)
- Testimony to Identify Heirs (PC 565)

ADDITIONAL DOCUMENTS AND FEES REQUIRED TO FILE A SMALL ESTATE

- Two copies of the Death Certificate
- A copy of the paid funeral/burial expenses receipt
- The original Last Will and Testament and any Codicils (if applicable)
- \$25.00** filing fee according to the Probate Court Fee Schedule
- \$13.00** certified copy fee according to the Probate Court Fee Schedule
- An **inventory fee** based on the value of the estate. (You may contact the court for the amount of this fee once you have determined to total value of the assets to be assigned).

Michigan Law MCL 700.3982 allows a small estate to be probated using an expedited process. The court files any wills and/or codicils but does not admit them to probate. A personal representative is not appointed and a court order is issued assigning assets.

The decedent must have been a resident of the county at the time of passing or was not a Michigan resident but left property within the county.

See next page for information regarding qualification for Petition for Assignment based on the values of the decedent's estate at the time of passing.

PETITION FOR ASSIGNMENT

To qualify for Petition for Assignment, the total value of the estate, subtracting any funeral and burial expenses which are either decedents or were paid by someone other than the decedent after the decedent's death is as follows:

DATE OF DEATH	MAXIMUM AMOUNT TO QULAIFY FOR PETITION FOR ASSIGNMENT	Maximum lien amount that can be used to reduce the total estate value to qualify for Small Estate (Gross Value)
02/21/2024 - Present	\$50,000	\$250,000
01/01/2024 - 02/20/2024	\$28,000	\$250,000
2023	\$27,000	\$250,000
2022	\$25,000	\$250,000
2021	\$24,000	\$250,000
2020	\$24,000	\$250,000
2019	\$23,000	\$250,000
2018	\$23,000	\$250,000
2017	\$22,000	\$250,000
2016	\$22,000	\$250,000
2015	\$22,000	\$250,000
2014	\$22,000	\$250,000
2013	\$21,000	\$250,000
2012	\$21,000	\$0
2011	\$20,000	\$0
2010	\$20,000	\$0
2009	\$20,000	\$0
2008	\$19,000	\$0
2007	\$19,000	\$0
2006	\$18,000	\$0
2005	\$18,000	\$0
2004	\$17,000	\$0
2003	\$17,000	\$0
2002	\$17,000	\$0
2001	\$16,000	\$0
10/01/1994 - 12/31/2000	\$15,000	\$0
12/13/1984 - 09/30/1994	\$5,000	\$0
07/01/1979 - 12/12/1984	\$2,500	\$0
10/01/1972 - 06/30/1979	\$1,500	\$0
08/28/1964 - 09/30/1972	\$1,000	\$0
09/03/1949 - 08/27/1964	\$500	\$0
09/10/1942 - 09/02/1949	\$200	\$0

Real estate lien value can be used to reduce inventory value for purposes in determining inventory fee but cannot reduce value more than the value of the real estate with lien.

STATE OF MICHIGAN PROBATE COURT COUNTY OSCEOLA	PETITION AND ORDER FOR ASSIGNMENT	CASE NUMBER and JUDGE HON. TYLER THOMPSON (P70870)
Court address 301 W. UPTON AVE., REED CITY, MI 49677		Court telephone number 231-832-6124

In the matter of _____ Put last 4 digits of SSN
 First, middle, and last name of decedent XXX-XX- in box 2 on MC 97.
 Last four digits of SSN

Petitioner's name, address, and telephone number

Petitioner's attorney, bar number, address, and telephone number

PETITION

I, _____, represent that:
 Name and relationship

1. Decedent died on _____ Date _____.
2. Decedent was a resident of _____ City/Township _____ in this county.
- Decedent lived outside of Michigan and left an estate within this county to be administered.

3. The decedent's personal and real property, gross values, and lien amounts (if any) are listed below. The values of all property are calculated as of the decedent's date of death.

Note: Do not provide financial account numbers on this form. If an account number is necessary to distinguish between accounts, put it on form MC 97.

Legal description of real property	Gross value	Lien amount	Inventory value (less lien)*
Legal description of real property	Gross value	Lien amount	Inventory value (less lien)*
Description of personal property	Gross value		Inventory value*
Description of personal property	Gross value		Inventory value*
Description of personal property	Gross value		Inventory value*
Description of personal property	Gross value		Inventory value*
Totals	Total Gross Value		Total Inventory Value

* For **real property** only, if the date of death is on or after March 28, 2013, the gross value of a parcel must be reduced by any lien amount on that parcel; however, the remaining inventory value of that parcel cannot be less than zero. For **personal property**, the gross value and inventory value are the same. (Attach a separate sheet if necessary.)

ORDER ASSIGNING ASSETS

In the matter of _____
First, middle, and last name of decedent

IT IS ORDERED:

- 7. The property described above is assigned as follows:
 - a. for funeral and burial expenses, \$ _____ to _____ ,
Name
\$ _____ to _____ , and \$ _____
Name
to _____ .
Name
 - b. to the surviving spouse, _____ .
 - c. to the following heirs in the stated proportions, _____

For 63 days from the date of this order, the share of each heir other than a surviving spouse or minor child shall be subject to any unsatisfied debt of the decedent up to the value of property received through this order.

- 8. The petition is denied. dismissed/withdrawn.

Judge signature and date

A Certified Copy of the Original on file in the Probate Court
Witness my Hand and the Official Seal this _____ day of
20_____
Osceola County Probate Court
Osceola County, Michigan
by _____ Register

STATE OF MICHIGAN JUDICIAL DISTRICT JUDICIAL CIRCUIT COUNTY PROBATE	PROTECTED PERSONAL IDENTIFYING INFORMATION	CASE NO. and JUDGE Hon. Tyler Thompson P70870
Osceola		
Court address 301 W. Upton Ave, Reed City, MI 49677		Court telephone no. 231-832-6124
Plaintiff's/Petitioner's name	v	Defendant's/Respondent's name
In the matter of _____		

This form is nonpublic because it contains personal identifying information (PII) that is protected from public inspection under MCR 1.109(D)(9)(a). Use this form to provide PII only for a person who is a defendant, respondent, or decedent. If the person is a plaintiff, petitioner, or other individual, use form MC 97a.

Instructions:

- When PII (such as date of birth) must be filed with the court on a public document, DO NOT include it on that public document. Instead, you must provide it on this form.
- **Provide only** the protected PII required for your particular case. For example, if you are filing a public document that requires you to provide a date of birth to the court, complete only that field on this form.

Name of form/document that this MC 97 is being filed with: _____

Printed name of individual completing form and date _____

Instructions: Provide the name of the person that the PII applies to, followed by the specific PII that is required to be provided. For Other, specify the type of PII in addition to the PII itself. Use the below reference number (Ref. No.) in the public document in place of the protected PII. For example, insert "Ref. No. 1" in place of the DOB in the public document.

Ref. No.	Name (required)
1	Date of birth
2	National ID no. / Last 4 digits of SSN XXX-XX-_____
3	Driver's License / State-issued ID no.
4	Passport no.
5	Other

Ref. No.	Instructions: List the name of the financial institution and the account number. List the paragraph that references the account, if needed for clarity. Use reference number (Ref. No.) when necessary to refer to account in public documents.		
6	Financial institution	Account no.	Paragraph no.
7	Financial institution	Account no.	Paragraph no.
8	Financial institution	Account no.	Paragraph no.
9	Financial institution	Account no.	Paragraph no.

STATE OF MICHIGAN PROBATE COURT COUNTY OSCEOLA	TESTIMONY TO IDENTIFY HEIRS	CASE NO. and JUDGE HON. TYLER THOMPSON (P70870)
Court address 301 W. UPTON AVE. REED CITY MI 49677		Court telephone no. 231832-6124

In the matter of _____
First, middle, and last name of decedent

1. My name is _____ . My address is _____

2. I am related to the decedent (or know his/her family) as follows: _____

3. The date and time of the death of the decedent is _____ and at that time the
Date Time
decedent's domicile (residence) was _____
Address

NOTE: IN THE FOLLOWING QUESTIONS, TREAT ALL PERSONS WHO DIED WITHIN 120 HOURS AFTER THE DECEDENT AS IF THEY DID NOT SURVIVE THE DECEDENT. List persons who died within 120 hours after the decedent in item 14 below.

4. The decedent did not leave a surviving spouse.
 left a surviving spouse named _____

5. a. The decedent had the following children, both natural (born in or out of wedlock) and adopted:

b. Of the children listed in 5a, the following are no longer heirs due to their adoption by someone other than a stepparent: _____

c. Of the children listed in 5a, the following were not children of the surviving spouse: _____

Answer question 6 only if question 5a was checked.

6. a. The following children listed in 5a died before the decedent: _____

b. Children listed in 6a left their own children (either natural or adopted) or left grandchildren from one or more of their own predeceased children who survived the decedent. The names of these descendants and the name of the child in 6a to whom they are related are as follows:

c. Of the persons listed in 6b, the following are no longer heirs due to their adoption by someone other than a stepparent: _____

If decedent left no surviving descendant, complete 7.

7. The decedent did not leave a surviving parent. left a surviving parent named _____

If decedent is not survived by spouse, descendants, or parents, complete 8 (and 9, if applicable).

8. The decedent did not leave surviving brothers or sisters. left the following brothers or sisters, either natural or adopted, whole blood or half blood, who were not adopted by others and who survived the decedent:

9. One or more of the brothers and sisters of the decedent died before him/her leaving descendants, either natural or adopted, who were not adopted by others and who survived the decedent. The names of these descendants, and the name(s) of their deceased ancestor are _____

If decedent was not survived by spouse, descendants, parent, brother, or sister or children of deceased brother or sister, complete 10 (and 11, if applicable).

10. The decedent did not leave surviving grandparents. left surviving grandparents (both maternal and paternal) named _____

11. Both maternal grandparents and/or both paternal grandparents died before decedent. Their surviving descendants and their relationships to the grandparents are

Maternal grandparents: _____

Paternal grandparents: _____

12. The following heirs listed above are under legal disability and are currently living. Their name(s), legal disability, and name(s) of their representative(s) are _____

13. The following deceased heirs survived the decedent by more than 120 hours. Their name(s) and the name(s) of those who represent decedent's interests are _____

14. The following persons identified above did not survive the decedent by 120 hours. Their names, relationships to decedent, and the date and time of their deaths are:

NAME	RELATION	DATE OF DEATH	TIME OF DEATH

