

ASSETS OF THE ESTATE OF: _____

Was Decedent a resident of Isle of Wight? ____ Yes ____ No

Is there a will? ____ Yes ____ No

Section One

1. Did the deceased own any real estate property in this Isle of Wight? ____ Yes ____ No

A. If the answer to Question 1 above is YES, answer the questions below. If NO, go to Question 2.

(i) Location of property: _____

(ii) Value of property: \$_____

(iii) Is this property owned with any other person? ____ Yes ____ No

If YES, name the other co-owner(s): (joint with right of survivorship?)

2. Did the deceased own any real estate property located outside of Isle of Wight County but in the state of Virginia? ____ Yes ____ No

A. If the answer to Question 2 is YES, answer the question below. If NO, go to Section Two.

(i) Location of property: _____

3. Did the deceased own real estate outside of Virginia? ____ Yes ____ No

ASSETS OF THE ESTATE OF: _____

Section Two

1. Did the deceased own any of the following? Circle YES or NO for each item listed below. If YES, give value – only those that were in the name of the deceased **without** named beneficiary or co-owners.

Stocks	YES	NO	\$ _____
Bonds	YES	NO	\$ _____
Investment Account	YES	NO	\$ _____
Savings Bond	YES	NO	\$ _____
Mutual Fund	YES	NO	\$ _____
Money Market Account	YES	NO	\$ _____
Certificate of Deposit	YES	NO	\$ _____
Savings Account	YES	NO	\$ _____
Checking Account	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	\$ _____

Section Three

1. Did the deceased have any insurance on his/her life? ___ Yes ___ No

A. If the answer to Question 1 is YES, answer the questions below. If NO, go to Question 2.

- (i) Who is the Beneficiary of the policy(ies)?

- (ii) If life insurance is payable to the decedent's estate, what is(are) the death benefit Payments(s)? \$ _____

Value of Policy: \$ _____

2. Was the deceased engaged in business as either a sole proprietor, partner, limited partner, or Corporate partner? ___ Yes ___ No

Section Three (cont'd)

A. If the answer to question 2 above is YES, answer the questions below. If NO, go to Question 3.

- (i) Describe the business interest: _____

- (ii) Provide the value of the business interest \$_____.

3. 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

A. If the answer to Question 3 above is YES, answer the questions below. If NO, go to Section Four.

- (i) Describe the estate or trust interest _____

- (ii) Provide the value of the interest _____

Section Four

1. Did the deceased own any automobiles, boats, trailers or other similar vehicles?

A. If the answer to Question 1 above is YES, answer the questions below. If NO, go to Question 2.

- (i) Describe the vehicle(s): Year Model: _____
- (ii) Provide the value of each vehicle as valued/taxed by Isle of Wight
\$ _____
- (iii) Is any vehicle owned with any other person? ___ Yes ___ No
If NO, go to Question 2
If YES, name the co-owners: _____

2. Provide the value of any antiques, rare collections, and farm equipment owned by deceased:
\$ _____

Section Five

List names and address of all legal heirs:

SUBMITTED THIS _____ DAY OF _____, 20 _____
