

JOHN H. GRAY
PROBATE JUDGE MCCORMICK COUNTY

133 S. MINE STREET, ROOM 101

PHONE: 864-852-2630

FAX: 864-852-1014

EMAIL: probatecourt@mccormickcountysc.org

Probate Work Packet

Documents that are bolded and italicized will need to be submitted to the Probate Office.

Today's Date: _____

Section 1: Decedent Information

Original Death Certificate

Full Legal Name: _____

Date of Birth: _____

Date of Death: _____

Last Known Address: _____

Resident of McCormick YES/NO

Copy of Paid Funeral Bill

- Name of the Funeral Home: _____
- Was the bill paid in full? YES/NO
- List the person/people who paid for the funeral bill and how much they paid:

• Was Life Insurance used to help cover the cost of the funeral? YES/NO

• Was the cost of the funeral covered via Pre-Need? YES/NO

• Was the Home Phone service WCTEL in Decedent's name? YES/NO

Billing Address: _____ Phone #: _____

Name of Spouse: _____

D.O.B.: _____

Address (if different than the Decedent): _____

**If Spouse is deceased, provide date of death: _____

Section 2: Will Information

Original Will

- Is there a **Will**? YES/NO

Section 3: Heirs and Devisees

- **List the children of the Decedent**

Include their full name, D.O.B., mailing addresses, phone numbers, and emails. Indicate if the child has pre-deceased him/her including their D.O.D. Use an additional piece of paper if needed.

Name: _____

Phone Number: _____ **Email:** _____

Address: _____

D.O.B. _____

Name: _____

Phone Number: _____ **Email:** _____

Address: _____

D.O.B. _____

Name: _____

Phone Number: _____ **Email:** _____

Address: _____

D.O.B. _____

Name: _____

Phone Number: _____ **Email:** _____

Address: _____

D.O.B. _____

Section 4: Real Estate and Titled Vehicles

Titles

- Did the Decedent own or have an interest in real estate/land in McCormick County? If yes, list the address(es) below:

- Did the Decedent own or have an interest in real estate/land in other counties or states? If yes, list the address(es) below:
- List the vehicles owned by the Decedent (including cars, trucks, campers, boats, motor, mobile home, motorcycles, etc.)

Section 5: Financial Institutions and Life Insurance

- Provide the names and any information that would be helpful for financial accounts solely in the name of the Decedent:
- List accounts that do not have a named Beneficiary or Pay Upon Death Designation:
- List the name(s) of the Financial Institutions of the Decedent. Include account numbers and estimated amount of funds:

Section 6: Applicant Information

Name of person completing this form: _____

Address if different from Decedent: _____

Phone Number: _____ Email: _____

Relationship to Decedent: _____

Signature of Applicant: _____ Date: _____

Printed Name of Applicant: _____

Office Use Only:

Copy of License: _____

Date Received: _____

Staff: _____

Please make an appointment:

864-852-2630

133 South Mine St. Room 101

McCormick, SC 29835

Checklist:

Please bring the following to your initial meeting:

- Original Death Certificate
- Original Will
- Paid Funeral Bill
- Obituary
- Deeds and Titles for Property
- Completed Probate Work Packet
- \$25-\$95 cash or check payable to McCormick County Probate Court (amount varies depending on the value of the estate) in the event an estate will need to be opened

A **Full Estate** will need to be opened if:

- There is real estate to be probated and/or
- Amount of probated assets is greater than \$45,000

A **Small Estate** will need to be opened if:

- Only titles need to be transferred and/or
- If the amount of probated assets is less than \$45,000

Some Possible Next Steps:

- Determine who will be the Personal Representative if an estate is opened
 - Other heirs will need to sign a Renunciation of Right to Administration
- Fill out Inventory and Appraisement form of assets
- Obtain Certificate of Appointment documents to enable the Personal Representative to take care of business for the Decedent until the estate is settled (i.e. pay bills, write checks, cash checks, etc. for the estate)
- If there is real estate involved, a Deed of Distribution will need to be completed by an attorney to close the estate

