

# ESTATE WORKSHEET

**Purpose:** To provide the Probate Court with information concerning the assets of the decedent in order to determine what type of estate proceeding is necessary.

**Notice:** This is only a worksheet. If there is not enough space on this worksheet for your information, attach a standard 8 ½ x 11 sheet of paper to this worksheet. Complete in black ink. Do not use pencil. Please call our office at **(803) 283.3379** if you have any questions about completing this worksheet.

DECEDENT'S NAME: \_\_\_\_\_

DECEDENT'S DATE OF DEATH: \_\_\_\_\_

YOUR NAME: \_\_\_\_\_

YOUR ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

YOUR DAYTIME TELEPHONE NUMBER: \_\_\_\_\_

YOUR RELATIONSHIP TO DECEDENT: \_\_\_\_\_

**Did the decedent have a will?**  Yes  No

If so, who is named as the Primary Personal Representative? \_\_\_\_\_

If the person named as the Primary Personal Representative is deceased, is there a Secondary and/or Alternate Personal Representative named in the will? \_\_\_\_\_

If different from the person completing this form, please list his/her name, address, and phone number. \_\_\_\_\_

To the best of your knowledge, was the decedent a patient in a South Carolina Mental Health facility during his/her lifetime?  Yes  No

Where was the decedent living at his or her time of death? (Check below.)

- apartment
- nursing home
- own home or condominium
- prison/jail
- other

Is the deceased's name on the title to this property?  Yes  No

**On the next page, list ALL property owned by the decedent at the time of his/her death and state the value at the time of death. The instructions below indicate what type of information is required to be listed. If you do not have enough space on the worksheet for your information, please attach a standard 8 ½ x 11 sheet of paper for your additional information.**

**Real Estate**--Give the location (Street/City/County/State). If there is a mobile home on the property, list it separately. If the real estate is joint with right of survivorship, you are not required to list it on this worksheet. **In order for the real estate to be joint with right of survivorship, it must have survivorship language included in the deed. Please carefully review the language of your deed to ensure that it is joint with right of survivorship and not joint tenants in common.**

**Stocks and Bond**--For stocks, list the name of the stock, the number of shares and the value. For bonds, list the denomination, the series, and the value. If the stocks and bonds are joint with right of survivorship, not tenants in common, you are not required to list it on this worksheet. **Please carefully review the language on your stocks and bond to ensure that it is joint with right of survivorship.**

**Bank Accounts**--Please list the name of the financial institution and the type of account. **Do not list account numbers on this worksheet.** If the accounts are joint with right of survivorship, you are not required to list them on this worksheet. **If you are uncertain that the accounts are joint with right of survivorship, please verify that information with your financial institution.** For the bank accounts that are in just the decedent's name alone or for accounts that are joint but without right of survivorship, you will need to list the value for each individual account as of the date of death.

**Checks or refunds made payable to the decedent or his/her estate**--include the payor's name and check number and the amount.

**Life Insurance policies owned by the decedent and payable to the decedent's estate**--list the insurance company's name and the amount of the policy.

**Vehicles or mobile homes**--list the year, make, and model and vehicle identification number (VIN#). If the vehicles are in just the decedent's name alone list them accordingly. If they are joint with another person, list the joint owner and specify that they are titled "and". If the decedent owned any vehicles that are titled "or", you are not required to list them on this worksheet. You may wish to obtain a statement from a dealer regarding the value of any vehicles, mobile homes or boats. **Also include the value of the household furniture, furnishings and personal items. However, if the decedent is survived by a spouse, you are not required to list it on this worksheet unless it is an exception covered in 62-2-805.**

**Annuities, retirement, 401-Ks or IRAs in which the estate of the decedent is the beneficiary**--list the type of account, the name of the company/financial institution and the value as of date of death.

**\*If there are no assets**, but you need to open the estate for litigation purposes, you need to state that there are no assets, and state what type of litigation you intend to pursue. Please provide the court with any current correspondence concerning the litigation.

**Unclaimed Property**--contact all state Treasurer's offices in which the decedent has lived to determine if the decedent has any unclaimed property to collect.

**Cooperatives**--contact all Cooperatives, i.e., Lynches River Electric Cooperative, Horry County Telephone Cooperative (HTC), in which the decedent may have had an account in his/her name to determine if the decedent has a capital credit account to collect.

<u>Description of Property</u>	<u>\$ Value</u>
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____
11. _____	_____
12. _____	_____
13. _____	_____
14. _____	_____
15. _____	_____
16. _____	_____
17. _____	_____
18. _____	_____

**LIST THE DECEDENT'S RELATIVES: If none or deceased, so indicate and list date of death if known.**

**Decedent's spouse; List name, complete mailing address and year of birth:**

**Decedent's children still living; List name, complete mailing address and year of birth:**

---

---

---

---

---

---

---

---

**Child predeceasing decedent: Name**

**List name, complete mailing address and year of birth of his or her children:**

---

---

---

---

**Child predeceasing decedent: Name**

**List name, complete mailing address and year of birth of his or her children:**

---

---

---

---

**If you answered “NONE” to all of the previous questions about relatives, list the decedent’s parents:**

Mother: (name) \_\_\_\_\_ Deceased? \_\_\_\_\_  
(address) \_\_\_\_\_

Father: (name) \_\_\_\_\_ Deceased? \_\_\_\_\_  
(address) \_\_\_\_\_

**If you answered “NONE” to all of the questions about relatives and both parents or all persons listed are deceased, please list the name and addresses of the decedent’s siblings. If the decedent’s siblings are deceased, you will list the names and addresses of the deceased sibling’s children. If you have any questions concerning this information, please contact the Probate Court at (803) 283.3379.**

**List the names, complete mailing addresses and year of birth of any other persons named in the decedent’s will along with their relationship to the decedent.**

---

---

---

---

---

---

---

---

**Are any of the persons listed on the worksheet under the age of 18?  Yes  No  
(If your answer is “Yes”, write the age and date of birth next to the person under 18 years of age.)**

**Litigation**

You must provide the Court with copies of the latest correspondence, court filings, mediation and arbitration concerning the litigation.

Type of Litigation: \_\_\_\_\_  
Name of Attorney: \_\_\_\_\_  
Address \_\_\_\_\_  
City, State, Zip \_\_\_\_\_  
Phone Number \_\_\_\_\_  
Fax Number \_\_\_\_\_

**AFTER YOU HAVE COMPLETED THIS WORKSHEET**, please hand-deliver these following items to the court, between the hours of **8:30 a.m. until 4:30 p.m.** Monday through Friday. **We are located on the 2<sup>nd</sup> floor of the Lancaster County Courthouse, 104 N. Main Street, Lancaster, SC 29720.**

- The completed worksheet
- A certified copy of the death certificate
- Original Will, Codicils and Written Memorandums
- If there is real estate in the decedent's name, please go to the Tax Assessor's office, Room 213, and ask for a Record Card and a copy of the Property card. Once you have this information, please go to the Register of Deeds office, Room 203 and get a copy of the latest deed. **The Tax Assessor's office and the Register of Deed's office are located in the County Administration Building at 101 N. Main Street, Lancaster.**

**After the court receives all of the documents listed above and the completed worksheet, it will be reviewed by the Judicial Assistant assigned to your case. If further information is needed, you will be contacted by your Judicial Assistant. Once any additional information or documents requested by the court have been provided and reviewed, your Judicial Assistant will contact you to schedule an appointment. You will be informed at that time as to the amount of fees that will be needed on the day of your appointment.**

**COURT PERSONNEL ONLY:**

Date of death: \_\_\_\_\_

Date searched: \_\_\_\_\_

Pending file: \_\_\_\_\_

Demand for  
Notice: \_\_\_\_\_

Prior GC: \_\_\_\_\_

Prior ES: \_\_\_\_\_

Probate of  
Will (no appt): \_\_\_\_\_

Other: \_\_\_\_\_