

Chesterfield Circuit Court Clerk's Office
Probate Division
P.O. Box 125
Chesterfield, VA 23832-0909
Phone: 804.706.7680
Fax: 804.717.6797

Appointment Date: _____	Appointment Time: _____ AM/PM
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PROBATE APPOINTMENT CHECKLIST

Please call to schedule a probate appointment and bring the following items with you.

Original Will and Codicil(s): *If possible, this should be faxed prior to your appointment.
All dates should match and signatures should be notarized. Please note that the Clerk's Office must retain the original Will and Codicil(s) after probate.

Death Certificate of the Decedent: *If possible, this should be faxed prior to your appointment.
If a named executor or an heir that has first right to qualify is deceased, we will require a copy of his/her death certificate.

List of Assets:
Determine the estimated dollar value of the assets held only in the decedent's name.
PLEASE COMPLETE AN ESTATE ASSET WORKSHEET

Original Deposition(s)/Waiver(s): *If possible, this should be faxed prior to your appointment.

Depositions: If the Will or Codicil is not self-proving (properly executed) or if the Will is holographic (handwritten), then depositions from witnesses and/or the notary are required.

Waivers: Waivers of qualification will need to be provided if an executor named in a Will or Codicil, or an heir that has the first right of qualification desires to waive his/her right to qualify as an executor or administrator.

All forms must be **NOTARIZED** unless signed in the presence of a deputy clerk. The Clerk's Office has forms available, as needed. Forms are also available for download at the following web site:
<http://www.courts.state.va.us/forms/circuit/fiduciary.html>.

Bondsperson for Surety Bonds:
If it has been determined that surety is required on your fiduciary bond, it will be necessary for you to arrange for a bondsperson to be present at your designated appointment. You may request a list of known bondspersons from the Clerk's Office to assist you in obtaining the bondsperson of your choice.

Appointment of Resident Agent:
All non-resident fiduciaries must appoint an in-state resident to serve as resident agent to accept service of process or other notices on behalf of the estate. Prior to being appointed as resident agent, this individual must consent to the appointment in writing. A form is available in the Clerk's Office or online (<http://www.courts.state.va.us/forms/circuit/fiduciary.html>) for this purpose.

List of Heirs: ***If possible, this should be faxed prior to your appointment.**

Include the names, relationship to decedent, and addresses of the decedent's heirs. If an heir is deceased, include his/her name (as deceased) and also list his/her heirs. Use additional sheets, if necessary.

Be sure to include first, middle and last names of the heirs.

Name _____ Relationship _____

Address _____

Name _____ Relationship _____

Address _____

Name _____ Relationship _____

Address _____

Name _____ Relationship _____

Address _____

Check, Cash, Money Order or Visa/MasterCard for the Probate Fees:

The exact amount will be determined at the probate appointment. Payment is due at the time of the appointment.

Fees, taxes, and costs:

State Probate Tax	(\$.001 x value of probate assets)
Recordation of Will	\$16.00 up to 10 pages (includes Clerk's Order)
Recordation of List of Heirs	\$16.00
Transfer Fee	\$1.00/parcel (only if real estate involved)
Clerk's Fee	Sliding scale (maximum \$30)
Certificate of Qualification	\$2.00 each (two included in base fee)

Government Issued Photo Identification

Acceptable identification: Valid Driver's License or non-driver ID card, U.S. Military ID, U.S. or foreign passport, or Alien registration card with photo.

Location:

The Circuit Court Clerk's probate office is located in the main Courts Building at **9500 Courthouse Road** (at the intersection of Iron Bridge and Courthouse Roads). After entering at the front of the building, proceed through security, take an immediate left and enter into the Circuit Court Clerk's Office. Advise the receptionist that you have a probate appointment.