

## **Appointment Checklist – Testate (with Will)**

### **Jefferson County, WV**

You must make an appointment with the Probate Office in order to open an estate. Be sure to complete the checklist before your appointment time to expedite the process.

**Karen Olden** – 304-728-3230 – [kolden@jeffersoncountywv.org](mailto:kolden@jeffersoncountywv.org)

**Joe Burwell** – 304-728-3210 – [jburwell@jeffersoncountywv.org](mailto:jburwell@jeffersoncountywv.org)

- ☐ Certified copy of the death certificate (Jefferson County must be listed as the decedents residence county)
- ☐ **ORIGINAL** signed last will and testament and codicil, if one exists – we must keep the original
  - Determine if bond is waived in the will, if not and there is not a sole beneficiary, then a surety bond will be required
- ☐ Names and addresses of all beneficiaries (individuals named in the will)
- ☐ Approximate value of all personal property held SOLELY in the decedents name excluding real estate
- ☐ Payment – fees may vary but are typically between \$80-\$100

### Decedent Information

Name: \_\_\_\_\_ Estate#: \_\_\_\_\_

Date of Death: \_\_\_\_\_

Residence Address: \_\_\_\_\_

\_\_\_\_\_

### Will Information

Does will waive bond or only have one beneficiary? ☐ Yes ☐ No

If no, then a bond will need completed prior to the Executor/rix can be appointed.  
A WV resident can post a property bond or corporate bond. A non-resident can only post a corporate bond.

Has the will been witnessed? ☐ Yes ☐ No

Witness #1: \_\_\_\_\_

Witness #2: \_\_\_\_\_

Is the will notarized? ☐ Yes ☐ No

If no, then witness affidavits will need to be completed.

### Fiduciary Information *(person applying for the estate)*

Name: \_\_\_\_\_ Type of ID: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

### Heirs and Beneficiaries

Name	Address	Relationship to Decedent

### Probate Assets

These can be estimates at this point. An actual accounting will be required to be filed at a later date.

Tangible personal property owned SOLELY by and titled SOLELY in the name of the decedent. (furnishings, jewelry, firearms, tools, antiques, vehicles etc.	\$ _____
Bank accounts, CD's, bonds, stocks, etc titled SOLELY in the name of the decedent with no survivor or beneficiary listed	\$ _____
Real estate titled SOLELY in the decedents name, not a rights of survivorship, transfer on death, life estate etc	\$ _____
All other assets not mentioned like insurance with no beneficiary listed, refund checks or other money payable to the estate	\$ _____
<b>Total</b>	\$ _____

Submitted by: \_\_\_\_\_ Date: \_\_\_\_\_