

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. . Immediate appointment of an Executor/rix may not be possible in every situation.

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- ☐ 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.
 - The will is not required to be notarized but must be witnessed by two people. If it is not notarized then witness affidavits must be completed.
 - Wills typically waive bond. If it is not waived and there is more than one beneficiary, then a surety bond will be required
 - A WV resident has two options for posting a bond.
 - Property Bond – You must bring a person that is willing to sign your bond that resides in and has title to real estate located in WV. They must apply for a Justification of Surety in the county in which the property is located. They can obtain this from that counties County Clerk. If the property is in multiple names ALL people listed must be present to sign.
 - Apply to purchase a corporate surety bond from a WV licensed insurance agent.
 - A non-WV resident can only apply for a corporate surety bond.
- ☐ 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

Please note our staff assists in the probate process. We do not provide legal advice. While an attorney is not required, some estates have complicated issues that may require you to seek legal counsel.

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	\$ _____
Total	\$ _____

Submitted by: _____ Date: _____

