ASSETS OF THE ESTATE OF: _____

Was Decedent a resident of Isle of Wight? ____ Yes ____No

Is there a will? ____ Yes ____ No

Section One

1. Did the deceased own any real estate property in this Isle of Wight? ____ Yes ____ No

   A. If the answer to Question 1 above is YES, answer the questions below. If NO, go to Question 2.

      (i) Location of property: _____
      _____

      (ii) Value of property: $_____

      (iii) Is this property owned with any other person? ____Yes ____ No

      If YES, name the other co-owner(s): (joint with right of survivorship?)
      _____

2. Did the deceased own any real estate property located outside of Isle of Wight County but in the state of Virginia? ____ Yes ____ No

   A. If the answer to Question 2 is YES, answer the question below. If NO, go to Section Two.

      (i) Location of property:_____
      _____

3. Did the deceased own real estate outside of Virginia? ____ Yes ____ No

ASSETS OF THE ESTATE OF: _____

Section Two

1. Did the deceased own any of the following? Circle YES or NO for each item listed below. If YES, give value – only those that were in the name of the deceased **without** named beneficiary or co-owners.

Stocks	YES	NO	$_____
Bonds	YES	NO	$_____
Investment Account	YES	NO	$_____
Savings Bond	YES	NO	$_____
Mutual Fund	YES	NO	$_____
Money Market Account	YES	NO	$_____
Certificate of Deposit	YES	NO	$_____
Savings Account	YES	NO	$_____
Checking Account	YES	NO	$_____
Notes Receivable	YES	NO	$_____
Accounts Receivable	YES	NO	$_____
Pension Income	YES	NO	$_____
Annuity	YES	NO	$_____
Trust Income	YES	NO	$_____
Other Securities, etc.	YES	NO	$_____
Miscellaneous Cash	YES	NO	$_____

Section Three

1. Did the deceased have any insurance on his/her life? ____ Yes ____ No

   A. If the answer to Question 1 is YES, answer the questions below. If NO, go to Question 2.

      (i) Who is the Beneficiary of the policy(ies)?
      _____

      (ii) If life insurance is payable to the decedent's estate, what is(are) the death benefit Payments(s)? $_____
      Value of Policy: $_____

2. Was the deceased engaged in business as either a sole proprietor, partner, limited partner, or Corporate partner? ____ Yes ____ No

Section Three (cont'd)

A. If the answer to question 2 above is YES, answer the questions below. If NO, go to Question 3.

(i) Describe the business interest:_____
_____

(ii) Provide the value of the business interest $_____.

3. Did the deceased have an interest in any other estate or trust which had not been distributed to him/her prior to death? ____ Yes ____ No

A. If the answer to Question 3 above is YES, answer the questions below. If NO, go to Section Four.

(i) Describe the estate or trust interest _____
_____

(ii) Provide the value of the interest _____

Section Four

1. Did the deceased own any automobiles, boats, trailers or other similar vehicles?

A. If the answer to Question 1 above is YES, answer the questions below. If NO, go to Question 2.

(i) Describe the vehicle(s): Year Model:_____

(ii) Provide the value of each vehicle as valued/taxed by Isle of Wight
$_____

(iii) Is any vehicle owned with any other person? ____ Yes ____ No
If NO, go to Question 2
If YES, name the co-owners: _____

2. Provide the value of any antiques, rare collections, and farm equipment owned by deceased:
   $_____

Section Five

List names and address of all legal heirs:

_____

_____

_____

_____

_____

_____

SUBMITTED THIS _____DAY OF _____, 20 _____

_____ _____

_____ _____