

LIST OF HEIRS

COMMONWEALTH OF VIRGINIA VA. CODE § 64.2-509

Court File No.

..... Circuit Court

NAME OF DECEDENT

DATE OF DEATH

I/We, the undersigned, hereby state under oath that the following are all of the heirs of the Decedent:

NAMES OF HEIRS**ADDRESSES****RELATIONSHIP****AGE**

[] This LIST OF HEIRS is filed in addition to the LIST OF HEIRS previously filed with this Court on
DATE

I/we am/are (please check one):

[] Proponent(s) of the will (no qualification)

[] Personal representative(s) of the decedent's estate

[] Heir-at-law of intestate decedent (no qualification within 30 days following death)

Given under my/our hand this day of, 20
DATE

PRINTED NAME OF SUBSCRIBER

SIGNATURE OF SUBSCRIBER

PRINTED NAME OF SUBSCRIBER

SIGNATURE OF SUBSCRIBER

PRINTED NAME OF SUBSCRIBER

SIGNATURE OF SUBSCRIBER

State/Commonwealth of [] City [] County of to wit:

Subscribed and sworn to before me this day of, 20

by
NAME(S)

[] CLERK [] DEPUTY CLERK [] NOTARY PUBLIC

My commission expires

Registration No.

VIRGINIA: In the Clerk's Office of the Circuit Court this day of, 20
the foregoing LIST OF HEIRS was filed and admitted to record.

Teste:
CLERK

by:, Deputy Clerk

PROBATE TAX RETURN (CONFIDENTIAL)

Court File No.

COMMONWEALTH OF VIRGINIA VA. CODE §§ 58.1-1713, -1714

This return must be filed with the Clerk of Circuit Court at the time a will is offered for probate or the grant of administration is sought in such court when the estate exceeds fifteen thousand dollars (\$15,000) in value.

Circuit Court of

Decedent's name

Residence address at death (street, city, state)
.....

Date of birth Date and place of death

VALUE OF DECEDENT'S PROBATE ESTATE

(a) Personal Property \$

(b) Real Property Located in Virginia \$

TOTAL VALUE OF DECEDENT'S PROBATE ESTATE \$

I (we), the undersigned, declare under penalty of law that I (we) have examined this Return and to the best of my (our) belief it is a true, correct, and complete Return.

.....
DATE

SIGNATURE OF PERSON OFFERING WILL FOR PROBATE OR SEEKING GRANT OF ADMINISTRATION

Mailing Address:

.....
DATE

SIGNATURE OF ADDITIONAL PERSON SEEKING GRANT OF ADMINISTRATION

Mailing Address:

INSTRUCTIONS

GENERAL. The probate tax is not an inheritance tax or an estate tax. It is a tax imposed on the probate of every will or grant of administration on every estate that exceeds fifteen thousand dollars (\$15,000). The state probate tax rate is 10¢ for every \$100, or fraction thereof, of the value of the decedent's estate. No one is permitted to qualify as executor or administrator until this tax is paid. Cities and counties are permitted to impose a probate tax in an amount equal to one-third of the state tax.

WHAT'S INCLUDED. The tax is imposed on the decedent's probate estate. Thus, do not include (i) any property that the decedent owned with another with the right of survivorship, (ii) life insurance unless it is payable to the decedent's estate, (iii) real estate transferred by a transfer on death deed, or (iv) any other property passing by contract or beneficiary designation from the decedent to another person. In addition, you should not include any of the decedent's real estate located in another state.

VALUATION METHOD. Because of the difficulty in determining exact values at the time of probate or qualification, the Clerk will accept a reasonable estimate of the value of the decedent's personal property. You should try to be as accurate as possible when making your estimate in order to eliminate the need to return to the Clerk's Office and pay additional tax and/or increase your bond at a later time. If you do not know the actual value of the decedent's real property, you may use its assessed value for local real estate tax purposes.

VALUATION DATE. All property is to be valued as of the date of the decedent's death.

Non-Probate Assets for Rockford Laydeesman

	Value on Date of Death:
Checking account #345 at 4th National Bank titled Joint with right of survivorship with daughter Flower.	\$ 7,652.00
Pruvincial Life Insurance Policy Viola's daughter DaisyLu Named as beneficiary.	\$ 25,000.00
Total Non-Probate Assets	\$32,654

Probate Assets for Rockford Laydeesman

	Value on Date of Death:
Accounts at First Federal Credit Union: Titled in name of decedent, solely	
Prime share savings #001	\$ 74,385.00
Prime share checking #002	\$ 13,500.00
Prime MMA #003	\$125,689.00
FFCU CD #321	\$140,000.00
FFCU CD #686	\$ 85,000.00
Investment Account with spouse Viola named as beneficiary:	
Cash account component:	\$382,000.00
Virginia Municipal Bond:	\$150,000.00
U.S. Series EE Savings Bonds titled to Rockford's name only: 3 of them valued at \$5,000.00 each	\$ 15,000.00
Uncashed/Undeposited checks	
2015 federal tax refund	\$ 3,743.00
2015 Virginia tax refund	\$ 782.00
Total Assets	\$990,099

Debts for Rockford Laydeesman

Chase One Visa account #402578643277 balance as of March 31 statement. Last charge posted 3/6 when Rockford bought groceries. Visa has a credit life insurance policy to cover the balance up to \$5,000.00. Rockford paid the monthly premium to carry the policy.	$(\$4,287.00) + \$5,000 = \$0$
Unsecured consumer loan from First Federal Credit Union: \$10,000 loan with a current principal balance(.	$(\$7,245.00)$
Muppet Mastercard account #304472900022, balance as of March 31 statement. No credit life policy.	$(\$2,340.00)$
Dr. Colgate, DDS – dental work bill with a balance after insurance paid its portion.	$(\$785.00)$
Dr. Heath Health, M.D., - an unpaid bill, after insurance paid its share.	$(\$375.00)$
Wellness Laboratories bill for recent blood chemistry work - balance due after insurance payment was applied to full cost of \$3,000.00.	$(\$525.00)$
Unpaid subscription bill for <i>Daily Planet</i> newspaper to pay for daily and Sunday newspaper delivery for January through June. Bill is for \$60.00 at a rate of \$10.00 per month. January through March newspapers were delivered to Rockford before subscription canceled. Only used \$30.00.	$(\$30.00)$
Happy Homecare nursing and home helper invoice for daily care and assistance to Rockford for the period of March 1 through March 13, balance due.	$(\$2,765.00)$
Rockford's March rent was paid in advance. If apartment is not emptied by the end of the month, April rent must be paid in a sum of \$2,400.00, no pro-rated payment allowed for partial month of April.	\$0

Rockford's funeral costs.	(\$12,496.00)
The probate costs for opening the estate and obtaining the Certificates of Qualification. are	(\$100.00)
Probate tax of \$1.00 per thousand-dollar value of assets is charged. You must calculate this based on gross value of probate estate assets.	(\$991.00)
Surety premium on Bond.	(\$1,265.00)
Commissioner of Accounts (fees for inventory and accounting)	(\$ 368.00)
Total Debts:	(\$29,254)

Intestate Estate of Rockford Laydeesman

Assets:	\$990,099
Debts:	(\$29,254.00)
Total Assets:	\$960,845 / 5 = \$198,019.80
<i>Children from First Wife:</i>	
Rockford Laydeesman Jr.: 1/5	\$198,019.80
Delilah Laydeesman: 1/5	\$198,019.80
<i>Children from Second Wife:</i>	
Flower Laydeesman: 1/5	\$198,019.80 +
Flower (Non-probate)	\$ 7,652.00 = \$205,671.80
Granite Laydeesman: 1/5	\$198,019.80
Hyacinth Laydeesman: 1/5	\$198,019.80
DaisyLu (Non-probate)	\$ 25,000.00