

ESTATE PROJECT ASSIGNMENT AND GRADE RUBRIC

3 Parts to Project:

Part 1: 50 points

1. Heirs and Shares: 10 points
2. Probate forms: Tax return and Heirs at Law list (at Virginia Courts website): 15 points
3. 2 Charts (Spreadsheet or Word listings by category, asset name and value) of Probate assets and Non-probate assets: 25 points

Part 2: 25 points

Inventory: 25 points

(Forms on Virginia Courts website):

Part 3: 100 points

1. First and Final accounting including: Summary sheet, schedules of income/receipts, disbursements for debts and expenses and distributions to heirs: 80 points
2. Tax Certificate: 20 points

Resources:

1. Commissioner of Accounts websites (Fairfax has a really helpful one)
www.fairfaxcommissionerofaccounts.org
2. **Great internet site resource:** www.ProbateNation.com
3. Virginia Courts www.courts.state.va.us

