

NOTE: WHEN COMPLETING THE FOLLOWING SCHEDULES, PLEASE REMEMBER TO LIST ALL ASSETS, REGARDLESS OF SITUS. ALL OUT-OF-STATE ASSETS MUST BE DISCLOSED.

SCHEDULE A - Real Estate (All interests in real property except those held with right of survivorship) (If none, so state.)
(For jointly owned property with right of survivorship, see Schedule E.)

Item No.	Description (Include County & State)	Tax Assessor's Fair Market Value for year of Decedent's Death	Appraised Value	Appraised Value of Decedent's Interest (indicate fractions)
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In describing the real property, indicate how many buildings/houses are on the property, indicate if this is acreage/lot/vacant lot, include the property's STREET ADDRESS, COUNTY, STATE. It is also helpful to include the tax map number which can be obtained from your property tax notice.

Indicate value and portion of decedent's interest
 (Examples: 100% = \$48,000
 1/2 = \$24,000)

EXAMPLE:				
House & lot: 145 Gray Street, Horry (TM# 123-2-45), SC		79,000	84,000	1/2 = \$42,000
Vacant lot: 2003 Allen Avenue, Walhalla (Oconee County), SC		2,000	3,400	100% = \$ 3,400
12 acres: Highway 221, Charlotte (Mecklenburg County), NC		96,000	120,000	1/3 = \$40,000

Do not deduct the mortgage balance from the value of the property; encumbrances (such as the mortgages and other liens) are listed on page 6.

TOTAL SCHEDULE A \$ If none, so state
 (also enter under recapitulation, page 1)

SCHEDULE B - Stocks and Bonds (If none, so state.) (For jointly owned property with right of survivorship, see Schedule E.)

Item No.	Description	Face Value	Appraised Value
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For stock, indicate number of shares and company name(s) for each stock separately. If stocks or bonds are specifically titled as JTWRROS (joint tenants with right of survivorship), list them under Schedule E instead of in this Schedule.

List fair market value of decedent's interest (indicate any fractional interest such as 1/2, 1/4, etc.)

For municipal bonds, list company name

For savings bonds, list number of bonds and series type; if savings bonds are "POD" (payable on death) to a specific person, list under Schedule G.

TOTAL SCHEDULE B \$ If none, so state
 (also enter under recapitulation, page 1)

SCHEDULE C - Notes due to decedent and Money on hand and in banks. (If none, so state.) (For jointly owned property with right of survivorship, see Schedule E.)

Item No.	Description	Value
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Mortgage note payable **TO** the decedent, list name of mortgagee(s)(debtor).
 (Mortgages payable **BY** the decedent are listed under the ENCUMBRANCES section, on page 6.)

List value/balance as of date of death

Promissory Note payable **TO** the decedent (promissory notes, etc.), list the name of the debtor/note maker.

Cash on hand

List separately any checking accounts, savings accounts, CD's, money markets, etc., in the DECEDENT'S NAME ALONE:

Indicate name of bank/institution and type of account

Uncashed employment check

Uncashed travelers checks

Survival litigation proceeds

TOTAL SCHEDULE C \$ If none, so state
 (also enter under recapitulation, page 1)

SCHEDULE D - Insurance (If none, so state.)

Part 1 - Life Insurance - Payable to the Estate

Item No.	Description	Value
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Indicate name of insurance company for policies with **NO NAMED BENEFICIARY** or policies payable to the decedent's estate.

Amount of policy proceeds (usually face value)

TOTAL SCHEDULE D PART 1
(also enter under recapitulation, page 1)

\$ If none, so state

(If more space is required, insert tax schedules or additional sheets of same size.)

Part 2 - Life Insurance - Payable to Beneficiaries

Item No.	Description	Beneficiary (name of person receiving proceeds)	Value
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Indicate name of insurance company for policies with **NAMED BENEFICIARY** or policies payable to a beneficiary.

Amount of policy proceeds (usually face value)

TOTAL SCHEDULE D PART 2
(also enter under recapitulation, page 1)

\$ N/A

SCHEDULE E - Jointly owned Property (with right of survivorship) (If none, so state.)

NOTE: You must complete Schedule E if the decedent owned any **property jointly with right of survivorship** at the time of death, whether or not the decedent's interest is includible in the gross estate.

Percentage includible:

1 - Joint interest held by decedent and spouse - the amount is one-half (50%) of the value in all cases.

2 - Other joint interest - Generally you must include the full value of the jointly owned property in the gross estate. However, the full value should not be included if you can show that a part of the property originally belonged to the other tenant(s). The amount included is the amount of the decedent's contribution to the joint accounts.

Item No.	Description	Joint Owner(s) (list deceased and joint owners names)	Percentage Includible (indicate decedent's interest)	Appraised Value of Decedent's Interest
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List all property/assets here that the decedent owned that was titled with another person(s) as joint tenants with rights of survivorship, such as real property, bank accounts, certificates of deposit, vehicles, etc.

TOTAL SCHEDULE E
(also enter under recapitulation, page 1)

\$ _____

SCHEDULE F - Miscellaneous Personal Property - (tangible personal property, employment bonus or award, interest in a partnership or unincorporated business, articles or collections having either artistic or intrinsic value, etc.) (If none, so state) **(For jointly owned property with right of survivorship, see Schedule E.)**

Item No.	Description	Value
	<i>Household goods and furnishings. (It is not necessary to list each item separately unless litigation is anticipated. If decedent did not own a full interest, indicate his/her fractional interest [1/2, 1/4 etc.]).</i>	<i>List fair market value as of date death</i>
	<i>Personal effects (clothing, jewelry and other personal items). It is not necessary to list items separately unless litigation is anticipated and may be included with household goods and furnishings.</i>	
	<i>Automobile (full interest if in decedent's name alone or show 1/2 interest if title indicates "AND"; If title indicates "OR" list under Schedule E). Indicate year, make and model of vehicle.</i>	
	<i>Mobile Home (full interest if in decedent's name alone or show 1/2 interest if title indicates "AND"; If title indicates "OR" list under Schedule E). Indicate year and make of mobile home.</i>	
	<i>Boat/Motor/Trailer: Indicate year and model for each.</i>	
	<i>Jewelry (sentimental items need not be listed; list may be included with personal effects).</i>	
	<i>Collectibles (coins, artwork, guns, etc.)</i>	
	<i>Business: Indicate company/partnership name and decedent's interest.</i>	
	<i>Farm/yard equipment</i>	
	<i>Lottery winnings</i>	
	<i>Cemetery plots (include only plots now vacant; indicate decedent's interest and location of vacant plot(s)).</i>	

TOTAL SCHEDULE F \$ *If none, so state*
(also enter under recapitulation, page 1)

NOTE: FOR SCHEDULES G, H, AND I, LIST VALUES ONLY IF PAYABLE TO ESTATE.

SCHEDULE G - Transfers During Decedent's Life - Transfers intended to take effect at death. United States Government Bonds "Payable on Death"; Trust created by Decedent in which income for life was retained; power to revoke or other incidents of ownership retained; life insurance transfers; lifetime transfers of real property in which Decedent retained a life estate or other incidents of ownership. (If none, so state.)

Did Decedent make transfers during lifetime as described above? YES NO

If "yes", please give date and type of transfer and list total amount **payable to estate**.

Only list item and value if payable to the estate.

TOTAL SCHEDULE G \$ *If none, so state*
(also enter under recapitulation, page 1)

(If more space is required, insert additional sheets of same size.)

SCHEDULE H - Powers of Appointment – Property, both real and personal, over which Decedent possessed a Power of Appointment whether Testamentary or otherwise. (If none, so state.)

Did Decedent possess a Power of Appointment? YES NO

(A power of appointment is generally granted to a person by a prior decedent's will or trust.)

If yes, did Decedent exercise the power of appointment in favor of estate? YES NO

If yes, please describe and list total amount **payable to estate**:

List item and value only if payable to this estate.

TOTAL SCHEDULE H

(also enter under recapitulation, page 1)

\$ If none, so state

SCHEDULE I – Annuities and retirement accounts (IRA's, 401(K), etc.) (If none, so state)

Did Decedent own any accounts as described above? YES NO

If yes, is the estate designated as the beneficiary of these accounts? YES NO

If yes, please describe and list total amount **payable to estate**:

List annuity, 401K or pension account and amount only if payable to the estate.

TOTAL SCHEDULE I

(also enter under recapitulation, page 1)

\$ If none, so state

ENCUMBRANCES (e.g., mortgages, liens, judgments, etc., but not general debts of the estate) - List specific assets encumbered

Item No.	Schedule & Item Number Encumbered Thereby	Description & Amount
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List liens against assets listed in above Schedules (i.e., mortgage on house, lien on car, etc.).

DO NOT LIST GENERAL DEBTS such as funeral expenses, medical expenses, utilities, etc.

TOTAL ENCUMBRANCES

\$ If none, so state

(also enter under recapitulation, page 1)

MANIFESTLY NON-TAXABLE

(To be executed by the Probate Court Judge in those cases where it appears that the estate is NOT REPORTABLE to the South Carolina Department of Revenue under the provisions of the Estate Tax Laws of the State of South Carolina, i.e., the total gross value is indicated to be less than prescribed limits.)

It appears from the foregoing record of the above captioned estate on file in the Probate Court of this County, such estate is not reportable to the South Carolina Department of Revenue.

Executed this _____ day of _____, 20_____.

Honorable Deirdre W. Edmonds, Probate Court Judge

(If more space is required, insert additional sheets of same size.)