

File #

**PART 1: GENERAL INFORMATION QUESTIONNAIRE**

A. Decedent's Name		B. Social Security Number	C. Date of Death
D. Decedent's Residence at Death		E. State	F. County
G. Marital Status at Death Married <input type="checkbox"/> Single, Widow(er) or Divorced <input type="checkbox"/>		Name of Surviving Spouse	
		H. West Virginia Counties Where Decedent Held Real Estate.	
I. Will this estate be required to file a Federal Estate Tax Return <b>FORM 706</b> (see instructions on page 2)?			YES <input type="checkbox"/> NO <input type="checkbox"/>
J. Will this estate be required to file the <b>Nonprobate Inventory Form ET 6.02</b> (see instructions on page 3)?			YES <input type="checkbox"/> NO <input type="checkbox"/>
K. Did the Decedent leave a <b>WILL</b> ?			YES <input type="checkbox"/> NO <input type="checkbox"/>
L. Fiduciary's Name and Mailing Address (include zip code)		M. Preparer's Name and Address	CPA <input type="checkbox"/> Attorney <input type="checkbox"/>
_____		_____	
_____		_____	
_____		_____	
Fiduciary's Phone Number:		Preparer's Phone Number:	

**PART 2: QUESTIONNAIRE OF NONPROBATE REAL ESTATE**

Answer each of the following questions concerning the decedent's interest in **NONPROBATE REAL ESTATE**.

If you answer "YES" to any question below, you must complete the attached **Inventory of Nonprobate Real Estate** provided with this form which shows:

- the type of transfer(s) with reference to the question number below;
- name(s) of the person(s) with an interest in the real estate as joint tenant or transferee;
- relationship to the decedent of ALL above named persons;
- market value at the date of death; and
- description of the real estate including assessed value.

	MARKET VALUE
1. Did the decedent own an interest in any real estate as joint tenant with right of survivorship?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	1
2. Did the decedent transfer an interest in any real estate without adequate consideration within three years prior to date of death?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	2
3. Did the decedent own an interest in any real estate in an inter vivos trust (living trust) arrangement or in which the decedent retained the right of use and enjoyment?.....YES <input type="checkbox"/> NO <input type="checkbox"/>	3
4. Did the decedent own an interest in any real estate in which the decedent retained a power of appointment, whether special or general?..... YES <input type="checkbox"/> NO <input type="checkbox"/>	4
5. Did the decedent own an interest in any real estate as a life estate including a dower interest?..... YES <input type="checkbox"/> NO <input type="checkbox"/>	5
6. Did the decedent own an interest in any real estate transferable by a transfer on death deed?..... YES <input type="checkbox"/> NO <input type="checkbox"/>	6
7. <b>TOTAL VALUE OF NONPROBATE REAL ESTATE</b> (add lines 1 through 6 above).....	7

**PART 3: SUMMARY OF PROBATE ASSETS**

Complete PART 4 first. Enter the total from each schedule of PART 4 on the appropriate line below.

	MARKET VALUE
1. Schedule A: Real estate or any interest therein.....	1
2. Schedule B: Tangible personal property of every kind.....	2
3. Schedule C: Government bonds and securities of every kind.....	3
4. Schedule D: Shares of corporate stock of every kind.....	4
5. Schedule E: Money, certificates of deposit, notes, accounts, etc. ....	5
6. Schedule F: All other assets not hereinbefore mentioned.....	6
7. <b>TOTAL VALUE OF PROBATE ASSETS</b> (add lines 1 through 6 above).....	7

**PART 4: INVENTORY OF PROBATE ASSETS – TRANSFERS BY WILL OR INTESTACY**

After completing PART 4, enter the total from each schedule on the appropriate line in PART 3.

<b>SCHEDULE A:</b> Describe any real estate or any interest in real estate. Include description and appraised value of out of state property, but do not include this amount in the total. See page 3 of the instructions.	<b>ASSESSED VALUE</b>	<b>APPRAISED VALUE</b>
<b>TOTAL</b> (enter the total appraised value on line 1 of PART 3)		

<b>SCHEDULE B:</b> Tangible personal property of every kind. See page 3 of the instructions.	<b>APPRAISED VALUE</b>
<b>TOTAL</b> (enter the total appraised value on line 2 of PART 3)	

<b>SCHEDULE C:</b> Bonds and securities of every kind. See page 3 of the instructions.	<b>APPRAISED VALUE</b>
<b>TOTAL</b> (enter the total appraised value on line 3 of PART 3)	

**PART 4 (continued)**

<b>SCHEDULE D: Corporate stock of any kind. See page 3 of the instructions.</b>				
<b>NAME OF THE COMPANY</b>	<b>CLOSELY HELD</b>	<b>NUMBER OF SHARES</b>	<b>MARKET VALUE PER SHARE</b>	<b>TOTAL MARKET VALUE</b>
<b>TOTAL (enter the total market value on line 4 of PART 3)</b>				

<b>SCHEDULE E: Money, bank accounts, certificates of deposits, notes, accounts receivable, etc. Show dates of notes. See page 3 of instructions.</b>	<b>APPRAISED VALUE</b>
<b>TOTAL (enter the total appraised value on line 5 of PART 3)</b>	

<b>SCHEDULE F: All other assets, not hereinbefore mentioned, including insurance payable to the estate. See page 3 of the instructions.</b>	<b>APPRAISED VALUE</b>
<b>TOTAL (enter the total appraised value on line 3 of PART 3)</b>	

**PART 5: BENEFICIARIES.** List the names and relationships of all beneficiaries or heirs of the estate. Show the age of any life tenant after their name. See page 3 of the instructions.

BENEFICIARY OR HEIR	RELATIONSHIP	BENEFICIARY OR HEIR	RELATIONSHIP

**PART 6: OATH OF FIDUCIARY**

State of \_\_\_\_\_ County of \_\_\_\_\_, To-wit:

I, \_\_\_\_\_, fiduciary for the estate of \_\_\_\_\_ after diligent effort to ascertain the taxable property of this estate, have made answers to each of the questions and have completed, in detail, the schedules for each category of property and believe each item thereof to be correct. I thereby believe the foregoing to be the true and lawful appraisal of ALL real estate and probate property of the estate of the above named decedent.

\_\_\_\_\_  
Fiduciary

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Notary Public

My Commission expires \_\_\_\_\_, 20\_\_\_\_

**PART 7: APPROVAL OF FIDUCIARY COMMISSIONER/FIDUCIARY SUPERVISOR**

I, \_\_\_\_\_, Fiduciary Commissioner/Fiduciary Supervisor of \_\_\_\_\_ County, West Virginia, to whom the estate of the above named decedent was referred, do hereby approve the foregoing appraisal of such estate.

Given under my hand this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Fiduciary Commissioner/Fiduciary Supervisor

By \_\_\_\_\_  
Deputy

**PART 8: CLERK OF THE COUNTY COMMISSION**

STATE OF WEST VIRGINIA

COUNTY OF \_\_\_\_\_, To-wit:

In the Clerk's office of \_\_\_\_\_ County on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, the forgoing appraisal of the above named decedent was presented and upon motion admitted to record.

Attest \_\_\_\_\_, Clerk

By \_\_\_\_\_, Deputy

Decedent's Name: \_\_\_\_\_

**INVENTORY OF NONPROBATE REAL ESTATE**

If you answered "YES" to any question under PART 2: QUESTIONNAIRE OF NONPROBATE REAL ESTATE, show the following on this page:

- a. the type of transfer(s) with reference to the question number in PART 2;
- b. name(s) of the person(s) with an interest in the real estate as joint tenant or transferee;
- c. relationship to the decedent of ALL above named persons;
- d. market value at the date of death; and
- e. description of the real estate including assessed value.