

# Orangeburg County Probate Court Closing Workshop

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PRESENTED BY: ORANGEBURG COUNTY PROBATE ESTATE CLERKS

# THE COURT REQUEST

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**If you have free time before we move to the next slide, please complete the following on each documents.**

**In The Matter Of: Write the Decedent's Name**

**Case/File Number: Write the case number, it is located on your file**

# APPLICATION FOR SETTLEMENT

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**Check the following boxes**

**Number 2**

Proof of Publication or No Publication Required

Inventory and Appraisement(s)

Final Accounting

Proof of Delivery If Applicable (Closing Documents)

All Required Tax Returns If Applicable

**Number 5**

Box C

# AFFIDAVIT OF TAX LIABILITY

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## NUMBER 1

The total gross value is located on the Inventory and Appraisement.

## ESTATE TAX RETURN

Have you filed an estate tax return? If not, check the box no estate tax return was filed

## NUMBER 2

Have you filed an individual tax return?

If you have circle **WAS**, if not circle **WAS NOT**

## NUMBER 3

Did the estate generate any additional money which qualifies as taxable income.

Sign, print your name, and date the form

# ACCOUNTING

\*\*\*\*\$5.00 Fee\*\*\*\*

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Check the box that says Final

The undersigned Personal Representative submits this accounting which covers the period from \_\_\_\_\_ (Decedent's date of death) through \_\_\_\_\_ (Today's date)

Beginning Balance: (Add Schedules B-I from the Inventory and Appraisement.

Plus Receipt: Any additional money that came into the estate after date of death.

Subtotal: Add your beginning balance and Plus Receipts together.

Less Disbursement and Distributions: Same number as subtotal

Ending Balance: Zero (0)

# ACCCOUNTING COUNTINUED

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## **Inventory Probate Assets & Receipts**

List probate assets received into estates

## **Disbursement & Distributions**

Probate assets disbursed and paid out from the estate

5% commission for Personal Representative from personal assets.

Will we will go pursuant to will

No will 50% to spouse and the other 50% to biological and legally adopted children and so forth.

# RECEIPT AND RELEASE WITH WAIVER

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If you are the sole devisee/heir disregard this form.

The heirs/devisee(s) will list any assets they have received from the estate.

Example: 2005 Honda Accord, \$1000 Check

Do not list real estate.

Beneficiary: The heir/devisee will sign his/her name

Witness: Will be any uninterested party within the estate.

# NOTICE OF RIGHT TO DEMAND A HEARING

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Read the paragraph on this form.

Once you have read the paragraph date, sign, and complete the form with your information.  
(Personal Representative)

# PROOF OF DELIVERY (CLOSING DOCUMENTS)

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If you are the sole devisee/heir disregard this form.

Check the box that states the original of which is on file with the Court.

On the \_\_ day of \_\_, 20\_\_ I mailed or delivered the following documents:

- Application for Settlement
- Accounting
- Receipt/Release with Waiver
- Notice of Right to Demand Hearing
- Choose your method(s) of delivery
- List the name and address of each heir or devisees

# DEED OF DISTRIBUTION

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FILING FEE \$15.00 (CHECK WITH THE REGISTER OF DEEDS) (803) 533-6236

THE DEED OF DISTRIBUTION MUST BE FILED AT THE REGISTER OF DEED OFFICE THEN YOU WILL SEND A COPY TO THE PROBATE COURT SHOWING PROOF IT WAS FILED.