

STATE OF SOUTH CAROLINA)
)
 COUNTY OF GREENVILLE)
)
 IN THE MATTER OF:)
)
 _____)
)
 Deceased)

IN THE PROBATE COURT
 INVENTORY AND APPRAISEMENT
 CASE NUMBER: _____

- ORIGINAL
- SUPPLEMENTAL # _____
- AMENDED

Personal Representative(s): _____
 Decedent's Social Security Number: n/a Was there a will? YES NO
 Decedent's Date of Death: _____ Domicile at death: _____
 (county) (state)

The undersigned, being sworn, states: That the following schedules contain a complete and accurate inventory and appraisal of all real and personal property of this estate so far as the undersigned is informed: that he/she has estimated and/or appraised all listed property at its fair market value, according to the best of his/her knowledge and ability.

Is the Decedent's estate required to file a Federal estate tax return? YES NO

SWORN to before me this _____ day of _____, 20____ Signature: _____
 Name: _____
 Address: _____

Notary Public for South Carolina Telephone (O): _____
 My Commission Expires: _____ (H): _____
 Email: _____

Co-Personal Representative
 Signature: _____ (if applicable)
 Name: _____
 Address: _____
 Telephone (O): _____
 (H): _____
 Email: _____

Attorney: _____
 Address: _____
 Telephone: _____
 Email: _____

For estates of decedents, the gross fair market valuation of all assets, regardless of situs, should be given as of the date of death. List all out-of-state assets on appropriate schedules. A Supplemental Inventory should be utilized for correcting, adjusting or adding to an original inventory. A qualified and disinterested appraiser may be employed to ascertain the value of any asset, the value of which may be subject to reasonable doubt. If an appraiser is employed, his/her name and address should be indicated with the item or items he/she appraised.

Within ninety (90) days following appointment, a copy of the inventory and appraisal shall be sent to each interested person who requests it, and the original inventory filed with the Probate Court.

RECAPITULATION

	Non-Probate	Probate
Schedule A - Real Estate.....	\$ N/A.....	\$ _____
Schedule B - Stocks and Bonds	\$ N/A.....	\$ _____
Schedule C - Notes Due Decedent and Cash.....	\$ N/A.....	\$ _____
Schedule D - Insurance on Decedent's Life - Part 1 - Payable to Estate.....	\$ N/A.....	\$ _____
Part 2 - Payable to Beneficiary.....	\$ N/A	
Schedule E - Jointly Owned Property	\$ N/A	
Schedule F - Other Miscellaneous.....	\$ N/A.....	\$ _____
Other Assets Payable to Estate:		
Schedule G - Transfers During Decedent's Life	\$ N/A.....	\$ _____
Schedule H - Powers of Appointment.....	\$ N/A.....	\$ _____
Schedule I - Annuities and Retirement Accounts.....	\$ N/A.....	\$ _____
TOTAL GROSS VALUE.....	\$ _____	
ENCUMBRANCES.....	(_____)	
TOTAL NET WORTH.....	\$ _____	

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 interest 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 fractional interest)
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TOTAL SCHEDULE A \$ _____
 (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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TOTAL SCHEDULE B \$ _____
 (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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TOTAL SCHEDULE C \$ _____
 (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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TOTAL SCHEDULE D PART 1 \$ _____
 (also enter under recapitulation, page 1)

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

Part 2 - Life Insurance - Payable to Beneficiaries

Item No.	Description	Beneficiary	Value
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N/A

N/A

TOTAL SCHEDULE D PART 2

\$ N/A

(also enter under recapitulation, page 1)

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 included 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 account(s).

Item No.	Description	Joint Owner(s)	Percentage Includible	Appraised Value of Decedent's Interest
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N/A

N/A

TOTAL SCHEDULE E

\$ N/A

(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
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TOTAL SCHEDULE F

\$ _____

(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.

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**:

TOTAL SCHEDULE G

\$ _____

(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.

Did Decedent possess a Power of Appointment? YES NO

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**:

TOTAL SCHEDULE H \$ _____
(also enter under recapitulation, page 1)

SCHEDULE I - Annuities and retirement accounts (IRA's, 401(K), etc.)

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**:

TOTAL SCHEDULE I \$ _____
(also enter under recapitulation, page 1)

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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TOTAL ENCUMBRANCES \$ _____
(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 Tax Commission 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____.

N/A – After 1/1/05

Debora A. Faulkner, Probate Court Judge

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