

INSTRUCTIONS FOR FILING A PETITION AND ORDER FOR ASSIGNMENT

- A completed petition (front and back) typed or printed legibly in ink and a death certificate. Only an heir or an individual who paid for the funeral bill may petition the court.
- An itemized funeral bill marked “**Paid**” which shows the amount paid and **who** paid it. If the funeral bill is not paid, you must have a copy of the bill showing the amount due.
- The completed petition must show the value of all assets **as of the date of death**. Examples of sources for information include newspaper clippings showing stock values; quote from an auto dealer showing the value of the auto, truck, etc. or value from the “Blue Book”. If there is real estate, a tax statement or something showing the state equalized value for the year of death. (The state equalized value is doubled for purposes of listing real estate value on the petition).
- List all information about the asset that is available. For bank accounts, show the name of the bank, the account number(s), and the balance at date of death. For stocks and bonds, show the name of the corporation, number of shares, price per share, and total value. For autos, trucks, boats, etc., include a description and the vehicle identification number. For real estate, list the complete legal description, not the street address. For vehicles or real estate where there is a secured loan, you may subtract the balance of the loan still owing (as of the date of death) from the value of the asset, but the net value can not be less than zero.

Please note: If the **only** asset to probate is a motor vehicle (**i.e.** automobile, truck, motorcycle, boat, mobile home, etc.), the Secretary of State office may be able to transfer the asset directly to the entitled heirs without the need of an Order from the court.

- The total value of the assets on the original and any amended petitions, after payment of funeral and burial expenses, may not exceed:

	AMOUNT
If the decedent died before January 1st, 2001	\$15,000.00
Date of Death in 2001	\$16,000.00
Date of Death in 2002 - 2004	\$17,000.00
Date of Death in 2005 - 2006	\$18,000.00
Date of Death in 2007 to Present	\$19,000.00

- The filing fee is \$25.00 plus a Gross Estate Fee based upon the Inventory Value of the assets before funeral expenses. Examples of the Gross Estate Fee: \$25.00 for \$1,000 in assets; \$69.00 for \$10,000 in assets; \$119.00 for \$20,000 in assets. The gross estate fee will be rounded down if fee ends in .01 to .49 and rounded up if fee ends in .50 to .99. There is also a \$12.00 fee for each certified copy of the Order requested.

Oakland County Probate Court
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