

USING THIS REVISABLE PDF FORM

1. Copies – Original and one copy to the Commissioner of Accounts.
2. Prepared by personal representative(s) of the estate and signed and sworn to in front of a notary.
3. Attachments –
 - a. Filing fee.
 - b. Receipts for any specific bequests under the will.
4. Preparation details –
 - a. This form is used when:
 - i. all heirs of an estate where there is no will, or all residuary beneficiaries under the decedent's will, are personal representatives of the estate;
 - ii. a minimum of 6 months have elapsed since the personal representative's qualification; and
 - iii. all debts and taxes have been paid and the entire net estate has been distributed.
 - b. This form cannot be used if the residuary beneficiary under the will is a trust.
 - c. Page two needs to be completed only if the personal representative(s) is (are) required to mail the statement under Virginia Code § 64.2-1303.

DATA ELEMENTS, page one

1. Insert the court file number.
2. Court name.
3. Name of decedent.
4. Date of decedent's death.
5. Check the appropriate box to indicate if the decedent had a will.
6. Names of fiduciaries (personal representatives of the estate).
7. Check appropriate box to indicate if the decedent died with or without a will.
8. List any specific bequests in the will and the name of the persons to whom those bequests are made.
9. Check the appropriate box to indicate whether copies of this statement were sent to anyone who is entitled to a copy under Virginia Code § 64.2-1303. If copies were mailed please complete page two.
10. Signature of fiduciaries.

To be completed by a Notary Public:

11. Location where form acknowledged.
12. Name of fiduciary.
13. Date when form was subscribed and sworn to.
14. Signature of notary public.
15. Date notary's commission expires.

DATA ELEMENTS, page two

1. Date copy was mailed to recipients listed.
2. Signatures of fiduciaries.
3. Name of recipient (person to whom the statement was mailed).
4. Recipient's address. Insert the address to which a copy of the statement was mailed.