

Jackson County Probate Court

312 S. Jackson St.
Jackson, MI 49201
Phone: 517-788-4290
Fax: 517-788-4291

Diane M. Rappleye
Probate Judge

Instructions for Petition and Order for Assignment (Small Estate)

If the estate of a deceased person consists of property valued at \$25,000 or less, the Court may issue an order that the property be assigned to the surviving spouse or, if there is not a spouse, to the decedent's heirs.

Completed paperwork must be legible and typed or written in ink. The Court is required by law to refuse any paperwork that is not legible.

You **MUST** include the following documents when you file.

- Petition and Order for Assignment (included in this packet)
- A copy of the death certificate
- Proof of all funeral expenses
- If the funeral expenses have been paid, proof of who paid those expenses

Funeral Expenses

A copy of the funeral and burial invoice/statement must be provided to the court indicating if the funeral expenses have or have not been paid. If the expenses have been paid, a RECEIPT from the funeral home *must specify who paid the bill and the amount paid*. **No exceptions.** An invoice/statement showing only a zero balance or simply marked "paid" is insufficient. Failure to provide the appropriate documentation may result in a denial of your petition. Filing fees are non-refundable.

If the funeral expenses were paid by someone other than the decedent, the decedent's assets must be assigned to the individual or individuals who paid the funeral expenses first as reimbursement for those expenses.

If the funeral expenses were paid using the decedent's assets, no reimbursement is necessary.

Liability

If the decedent's assets are assigned to someone other than a surviving spouse, or the decedent's minor child, a person receiving those assets is responsible for any unsatisfied debt of the decedent, up to the amount received for 63 days after the date of the order.

Fees (Fees cannot be returned if your petition is denied.)

- Filing Fee - \$25.00
- Certification Fee - \$11.00 (This fee ONLY is waived if the total value of the estate is \$500 or less.
- Inventory Fee – Varies based on the value of the estate. Ranges from \$5.00 to \$129.00. Call the Probate Office at the number above to verify the fee in your case.

STATE OF MICHIGAN PROBATE COURT JACKSON COUNTY	PETITION FOR ASSIGNMENT	CASE NO. and JUDGE
---	--------------------------------	---------------------------

Court address 312 S. JACKSON STREET JACKSON, MI 49201	Court telephone no. 517 788-4290
---	--

In the matter of _____

First, middle, and last name of decedent

Put last 4 digits of SSN
 XXX-XX- _____
 Last four digits of SSN

Petitioner's name, address, and telephone no.

Petitioner's attorney, bar no., address, and telephone no.

I, _____, represent that:
 Name and relationship

1. Decedent died on _____.
 Date

2. Decedent was a resident of _____ in this county.
 City/Township

Decedent lived outside of Michigan and left an estate within this county to be administered.

3. The decedent's personal and real property, gross values, and lien amounts (if any) are listed below. The values of all property are calculated as of the decedent's date of death. *For real property only, if the date of death is on or after March 28, 2013, the gross value of a parcel can be reduced by any lien amount on that parcel; however, the remaining inventory value of that parcel cannot be less than zero. For personal property, the gross value and inventory value are the same. (Attach separate sheet if necessary.)

Note: Do not provide financial account numbers on this form. If an account number is necessary to distinguish between accounts, put it on form MC 97.

Legal description of real property	Gross value	Lien amount	Inventory value (less lien)*
Legal description of real property	Gross value	Lien amount	Inventory value (less lien)*
Description of personal property	Gross value		Inventory value
Description of personal property	Gross value		Inventory value
Description of personal property	Gross value		Inventory value
Description of personal property	Gross value		Inventory value
Totals	Total Gross Value		Total Inventory Value

4. Funeral and burial expenses are \$ _____.

The following persons have paid the following amounts toward the funeral and burial expenses:
(Statements and receipts are attached.)

NAME	AMOUNT	NAME	AMOUNT

The amount of funeral and burial expenses remaining unpaid is \$ _____.

The total value of the decedent's property remaining after payment of funeral and burial expenses does not/will not exceed \$15,000 as adjusted annually for cost of living.

5. The name and address of the surviving spouse or, if there is not a spouse, the name, age, relationship, and address of each of the decedent's heirs are as follows:

NAME	AGE	RELATIONSHIP	ADDRESS			
			Street address	City	State	Zip
			Street address			
			City	State	Zip	
			Street address			
			City	State	Zip	
			Street address			
			City	State	Zip	
			Street address			
			City	State	Zip	

6. I REQUEST that the property listed above be assigned as follows:

- a. for funeral and burial expenses, \$ _____ to _____,
Name
\$ _____ to _____, and \$ _____
Name
- b. to the surviving spouse, _____.
- c. to the following heirs in the stated proportions, _____
_____.

I declare under the penalties of perjury that this petition has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Date

Petitioner signature

Date

Attorney signature

STATE OF MICHIGAN PROBATE COURT JACKSON COUNTY	ORDER FOR ASSIGNMENT (Part 1)	CASE NO. and JUDGE
---	--	---------------------------

Court address 312 S. JACKSON STREET JACKSON, MI 49201	Court telephone no, 517 788-4242
--	-------------------------------------

In the matter of _____ XXX-XX-
First, middle, and last name of decedent Last four digits of SSN

Petitioner's name, address, and telephone no.

Petitioner's attorney, bar no., address, and telephone no.

A petition for assignment was filed on _____
Date

IT IS ORDERED:

1. The property in the above-referenced petition for assignment is assigned as follows:
- a. for funeral and burial expenses, \$ _____ to _____,
Name
 \$ _____ to _____, and \$ _____
Name
 to _____
Name
 - b. to the surviving spouse, _____.
 - c. to the following heirs in the stated proportions, _____

For 63 days from the date of this order, the share of each heir other than a surviving spouse or minor child shall be subject to any unsatisfied debt of the decedent up to the value of property received through this order.

2. The petition is denied. dismissed/withdrawn.

Judge signature and date

I certify that I have compared this copy with the original on file and that it is a correct copy of the original.

Date _____
Deputy register

STATE OF MICHIGAN PROBATE COURT JACKSON COUNTY	ORDER FOR ASSIGNMENT (Part 2)	CASE NO. and JUDGE
---	--	---------------------------

Court address 312 S. JACKSON STREET JACKSON, MI 49201	Court telephone no, 517 788-4242
--	-------------------------------------

In the matter of _____ XXX-XX- [REDACTED]
First, middle, and last name of decedent Last four digits of SSN

Petitioner's name, address, and telephone no.

Petitioner's attorney, bar no., address, and telephone no.

A petition for assignment was filed on _____
Date

IT IS ORDERED:

1. The property in the above-referenced petition for assignment is assigned as follows:
- a. for funeral and burial expenses, \$ _____ to _____,
Name
 \$ _____ to _____, and \$ _____
Name
 to _____
Name
 - b. to the surviving spouse, _____.
 - c. to the following heirs in the stated proportions, _____

For 63 days from the date of this order, the share of each heir other than a surviving spouse or minor child shall be subject to any unsatisfied debt of the decedent up to the value of property received through this order.

2. The petition is denied. dismissed/withdrawn.

Judge signature and date

I certify that I have compared this copy with the original on file and that it is a correct copy of the original.

_____ <small>Date</small>	_____ <small>Deputy register</small>
------------------------------	---

STATE OF MICHIGAN JUDICIAL DISTRICT JACKSON JUDICIAL CIRCUIT COUNTY PROBATE	PROTECTED PERSONAL IDENTIFYING INFORMATION	CASE NO. and JUDGE
--	---	---------------------------

Court address _____

Court telephone no. _____

Plaintiff's/Petitioner's name	v	Defendant's/Respondent's name
In the matter of _____		

This form is nonpublic because it contains personal identifying information (PII) that is protected from public inspection under MCR 1.109(D)(9)(a). Use this form to provide PII only for a person who is a defendant, respondent, or decedent. If the person is a plaintiff, petitioner, or other individual, use form MC 97a.

Instructions:

- When PII (such as date of birth) must be filed with the court on a public document, DO NOT include it on that public document. Instead, you must provide it on this form.
- **Provide only** the protected PII required for your particular case. For example, if you are filing a public document that requires you to provide a date of birth to the court, complete only that field on this form.

Name of form/document that this MC 97 is being filed with: _____

Printed name of individual completing form and date _____

Instructions: Provide the name of the person that the PII applies to, followed by the specific PII that is required to be provided. For Other, specify the type of PII in addition to the PII itself. Use the below reference number (Ref. No.) in the public document in place of the protected PII. For example, insert "Ref. No. 1" in place of the DOB in the public document.

Ref. No.	Name (required)
1	Date of birth
2	National ID no. / Last 4 digits of SSN XXX-XX-_____
3	Driver's License / State-issued ID no.
4	Passport no.
5	Other

Ref. No.	Instructions: List the name of the financial institution and the account number. List the paragraph that references the account, if needed for clarity. Use reference number (Ref. No.) when necessary to refer to account in public documents.		
6	Financial institution	Account no.	Paragraph no.
7	Financial institution	Account no.	Paragraph no.
8	Financial institution	Account no.	Paragraph no.
9	Financial institution	Account no.	Paragraph no.