

INSTRUCTIONS FOR FILING
PETITION FOR ASSIGNMENT-PC 556m
ORDER FOR ASSIGNMENT (Part 1 and Part 2)-PC 556o

These basic instructions will help you complete and file a *Petition for Assignment* (sometimes referred to as a “**Small Estate**.”) The probate staff can help with your procedural questions, but we cannot give legal advice. If you have legal or complicated issues, we suggest that you consult an attorney.

Do not deduct real estate liens to determine if the estate qualifies as a small estate.

- The petition must be legibly typed or printed in ink in the English language.
- Next to “In the matter of _____” fill in the name of the decedent.
- Complete form **MC 97** Protected Personal Identifying Information to identify last four digits of Social Security number.
- Identify the Petitioner’s name, address, and telephone no. and the Petitioner’s attorney name, bar no., address, and telephone no. in the corresponding boxes.
- Insert your name and relationship to the decedent. Only an heir or an individual who paid the funeral bill may petition the court.
- You must have a **death certificate** (a copy is acceptable). List the date of death in #1 of the form.
- The death certificate must show that the decedent was a resident of Oakland County. If the decedent lived outside of Michigan but had property located in Oakland County, you may proceed with filing the Petition.
- In #3, list the gross value of the property **as of the date of death**. Specifically describe the property that was solely owned by the decedent. (We may only assign real estate located in Michigan). For real estate, include the complete legal description (not just the address). List only real property liens/mortgages and subtract them to get the “Inventory value (less lien).” For bank accounts, include the bank name and location. Do not provide financial account numbers. (Identify account numbers on **MC 97** Protected Personal Identifying Information.) For stocks and bonds, list the corporation and number of shares.
- You must also have a paid itemized **funeral bill** or statement of amount owing. If paid in full, it must show who paid it, such as “Paid in Full by _____.” A statement showing simply “Paid” or \$0 balance is not sufficient. Whoever paid any part of the funeral bill is listed in #4 and will be reimbursed in #6 for the amount they paid. If it has not been paid, the statement must show the balance owing.
- We are strictly limited to this chart. If the amount falls under the value below, this proceeding is appropriate.

Date of death in 2022 - Present	\$25,000	Date of death in 2007 - 2008	\$19,000
Date of death in 2020 - 2021	\$24,000	Date of death in 2005 - 2006	\$18,000
Date of death in 2018 - 2019	\$23,000	Date of death in 2002 - 2004	\$17,000
Date of death in 2014 - 2017	\$22,000	Date of death in 2001	\$16,000
Date of death in 2012 - 2013	\$21,000	If date of death before 1/1/01	\$15,000
Date of death in 2009 - 2011	\$20,000		

- After reimbursement/payment of funeral expenses in #4, any balance is assigned to the parties listed in #5. (If there is a spouse, the balance goes to the spouse. If there is no spouse, it is split between all heirs.)
- The filing fee is \$25. An Inventory Fee will be calculated on the “Total Inventory Value” in #3, which reflects the deduction of liens (mortgages) for each parcel of real estate only up to the parcel’s value. Each certified copy of the Order is \$13.
- Complete the Order for Assignment (Part 1) and (Part 2), copying the information as provided from the Petition for Assignment. Part 1 will be time stamped, signed by the judge, and certified by the court clerk for you to handle the assets identified. Part 2 will remain with the court clerk in the legal file.
- **Our hours are 8:00-4:30. Please arrive by 4:00 to allow ample time for processing.**