

A probate checklist is a helpful tool for individuals tasked with administering the estate of a deceased person. Probate is the legal process through which a court oversees the distribution of a deceased person's assets to their heirs and settles any outstanding debts. The specific requirements for probate vary depending on your jurisdiction, so it's essential to consult with a local attorney or professional who can guide you through the process. However, here is a general probate checklist to give you an idea of the steps involved:

*Please take time to grieve.*

**Probate process with a Will is called Testate Probate Process without a Will is Called Intestate**

**Obtain the Death Certificate:**

Request multiple copies of the death certificate from the relevant authorities.

- *5 originals are normally enough*

**Identify and Locate Assets:**

- Make a comprehensive list of the deceased person's assets, including real estate, bank accounts, investments, personal property, and any other valuable items.
  - *Include Mineral, oil & gas, water*
  - *Do NOT start selling off or giving away items unless you have correct authority to do so.*

**Secure and Manage Property:**

- Safeguard and manage the assets to prevent loss or damage.
  - *Do not pull funds out at an ATM with the deceased cards (that is fraud & illegal)*

**Contact an Attorney:**

- Consult with a probate attorney or legal professional who can guide you through the process and ensure compliance with local laws.
- *Give me a call for introductions to some great attorneys & CPA's and other professionals.*

**File the Will (if applicable):**

- If there's a valid will, submit it to the court for validation.

**Petition for Probate:**

- Prepare and file a petition with the probate court to initiate the probate process.

**Notify Creditors and Debtors:**

**NO NOT DO THIS UNLESS YOU ARE THE PERSONAL REPRESENTATIVE OR EXTECUTOR**  
 Notify known creditors and publish a notice to allow potential creditors to come forward with claims. INSTRUCTIONS ARE PART OF THE PACKET- GET LEGAL GUIDANCE FIRST.

**Inventory and Appraise Assets:**

- Create an inventory of assets and have them appraised as necessary.

**Manage Estate Finances:**

- GET AN EIN # FOR ESTATE (Must have to set up estate bank account.

Set up a separate estate bank account to handle financial transactions and expenses related to the estate.

- Track any out of pocket money to be reimbursed.

**Pay Debts and Taxes:**

- Pay off valid debts and calculate and pay any estate taxes or inheritance taxes that may be due. A CPA maybe a important part of this.

**Distribute Assets:**

- Follow the instructions in the will (if applicable) or distribute assets according to state law if there is no will.
- Wills are not meant to be subjective.

**File an Accounting:**

- Prepare and file an accounting with the court detailing all financial transactions related to the estate.

**Obtain Court Approval:**

- Seek court approval for your actions and accounting.

**Obtain Releases from Beneficiaries:**

- Obtain releases from beneficiaries, confirming they have received their inheritance.

**Close the Estate:**

- Once all tasks are completed and approved, request the court to close the estate.

**Final Accounting and Report:**

- Provide a final accounting and report to the court, detailing all activities and distributions made during the probate process.

**Distribute Remaining Assets:**

- Distribute any remaining assets as instructed by the court.

**File Closing Documents:**

- File the necessary closing documents with the court to formally close the probate process.

**Release and Discharge:**

- Obtain a formal release and discharge from the court, which confirms that the estate has been successfully settled.

**Retain Records:**

- Keep detailed records of all probate activities, as you may need them in the future.

Remember that the probate process can be complex, time-consuming, and costly. It's highly recommended to consult with a qualified attorney or professional to navigate the probate process



successfully. Additionally, the specific steps and requirements can vary by jurisdiction, so always consult the laws in your area to ensure compliance.