

Probate Checklist

File No. _____

ESTATE OF _____

AK CASE NO. _____

Initial Consultation Date: _____

Retained Date: _____

OPENING PROBATE

Documents to Prepare or Obtain at the Intake:

- Fee agreement
- Authorization for Release of Information
- Will - Date: _____
- Death Certificate - DOD: _____
- IRS Form SS-4

Documents to File with the Court:

- Entry of Appearance
- Application for Informal Probate/Appointment of P.R.
 - If bond not waived in Will, Consent and Waiver of Bond
- Statement of Informal Probate/Appointment of P.R.
- Letters Testamentary/Administration
- Last Will and Testament (if any)
- Death Certificate (or letter from funeral home)
- Filing Fee (\$150.00)

Opening Documents filed on: _____

ASSETS/LIABILITIES

Initial Asset Information:

- Has client provided decedent's asset/liability information at initial intake? Yes No
- Info needed _____

- Call client to request information needed

+90 days after appointment of PR Date: _____

- Prepare Inventory of Property
- Serve on all parties that have requested copy
- File inventory at discretion of attorney

AFTER LETTERS ISSUED BY COURT

Letters Signed on: _____

- Notice to Heirs and Devisees with Affidavit of Service - File and serve with cover letter, including copies of all pleadings filed to date, no later than 30 days after appointment of PR.
- Letter to Personal Representative outlining duties and including a certified copy of the Letters.

CREDITORS CLAIMS

- File Notice to Creditors Date Filed: _____
- Letter to known creditors w/copy of Notice to Creditors
- Publish Notice to Creditors
 > 1st publication date: _____
- Review CourtView for claims +60 days from date of 1st publication; Date: _____
- Review CourtView for claims +120 days from date of 1st publication; Date: _____
- EXPIRATION of creditors' claim period:** _____
- Affidavit of Publication filed.

If Claims are Filed or Presented:

- Prepare Notice of Satisfaction of Claim against Estate for each claim (to be used when claims are allowed and have been paid).
- Notice of Allowance of Claim (to be used if claim is allowed but estate is insolvent).
- Payment to creditors.
- Notice of Disallowance (to be used if claim is disallowed).
- Tickler 60 days from date of mailing Notice of Disallowance for objection deadline for creditor.

TAX RETURNS

- Accountant handling all tax matters and IRS filings for the Estate
 - Confirmation letter sent to accountant Date: _____

OR

- Attorney handling all tax matters and IRS filing for the Estate

	<u>DUE DATE</u>	<u>EXTENSION DUE DATE</u>	<u>FILED W/IRS</u>
Disclaimer DEADLINE (+ 9 months from DOD)	_____	_____	_____
Form 706	_____	_____	_____
Form 1040	_____	_____	_____
Form 1041	_____	_____	_____

ESTATE INTERIM DISTRIBUTIONS

- Personal Representative's Deed
 - Recorded
 - Conformed copy filed with court

Other Actions Needed: _____

With Distributions:

- Prepare Receipts Upon Distribution
 - Obtain beneficiaries' signatures
 - File with court

CLOSING ESTATE WITHOUT HEARING:

- Final Accounting and Notice of Proposed Distribution (At least 6 months after PR appointed)
 - Served on all heirs and filed on _____

30 Days Later:

- Prepare Receipts Upon Distribution
 - Obtain beneficiaries' signatures
 - File with court
- Prepare Sworn Statement to Close Estate (at least 6 months after Creditor's Notice published)
 - Filed with court on _____
 - Closing Order Issued: _____
- Receive Closing Order from court discharging personal representative.

Estate closes on: _____

CLOSING ESTATE WITH HEARING:

- Prepare and file Final Accounting and Notice of Proposed Distribution (at least 6 months after appointment)
 - Serve on all heirs
- File Petition for Settlement and Distribution with Affidavit of Service on all interested parties.
- Notice of Hearing (Set hearing not less than 30 days after of service of notice.)
 - Serve on all parties
 - Publish in newspaper (attorney determines) Published on: _____

After Hearing:

- Prepare Receipts Upon Distribution
 - Obtain beneficiaries' signatures (send distributions via certified mail)
 - File with court

Estate closes on: _____