

Tips for Preparing a Complete and Accurate Informal Application

From the Hennepin County Probate Registrars

An informal e-filed application cannot be changed once filed with the court. An amended application signed by the applicant is the only way to correct an application. Here are some tips for completing an accurate and complete informal application, testate or intestate.

Check for Demands using all name variations.

Enter all decedent's name variations starting with the way the testator signed the will, look at real estate documents, the death certificate, and the title on other probate assets.

Verify dates of birth and dates of death with the decedent's death certificate.

List all heirs whether a testate or an intestate application.

If only one parent is the heir, give the name and date of death of the predeceased parent.

If the predeceased spouse is named as a devisee in the will, list their name and date of death under interested parties.

If heirs are taking by right of representation, tell us who died to make that person an heir.

Priority for appointment - tell us what the will/codicil says not just who you want to be the PR.

Check for specified time period to seek appointment if the time has elapsed then proceed with the alternate PR.

Check for extended survivorship periods, if filing application within that time frame, name contingent beneficiaries. Minor contingent beneficiaries within the extended survivorship period will require a formal probate or waiting until the time period has elapsed.

Debts of decedent – do NOT LIST SECURED DEBT.

Evaluate exempt assets and non-exempt assets versus debt to verify solvency.

Do NOT prepare unnecessary documents. We only bond for Hennepin County Economic Assistance – no need to file bond waivers. Nominations are NOT required if the applicant is nominated in the will. Applicant does NOT have to nominate him or herself.

DO NOT prepare proposed orders and letters we do those electronically and sign them electronically.

PROOF READ AND DOUBLE CHECK SPELLING OF ALL NAMES