

ESTATES
FORMAL - SUPERVISED CHECK LIST
(Procedure before the Court)

TESTATE

- Filing fee & Atty I.D. No.
- Petition for Will & Appt.
- Will (Codicil, Separate Writing, if any)
- Testimony of S/Witness to Will
(if self-proving not required)
- Order and Notice of Hrg, Supv
- Affidavit of Mailing
- Affidavit of Publication
- Acceptance & Oath of PR
- Order of Formal Probate of Will &
Appt of PR in USP/SUP Admin
- Bond (if any)
- Letters Testamentary
- Inventory (w/in 6 months)
if SUP; if USP optional
- Claims (atty to ck w/Probate Office
after notice requirements)

Can close at this point if Estate remains USP
Close with ICS

If atty files for Decree, Estate goes SUP
(do SJIS correction form)

- Petition for Order of Comp.
Settlement & Decree of Dist.
- Final Account
- If Consents/Waiver filed, (**no need for
Ord/Hrg or AOM)
- Order for Hrg F/Acct **
- Affidavit of Mailing**
- Order Allowing Account
- Order of Comp. Stlmt & Decree
- Receipts for Residue (personal property only)
- Petition for Discharge
- Order of Discharge

**Order for Hearing not required if consents to Final Account & Decree of Distribution are filed with the Court.

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Note: If you choose to go **FORMAL, UNSUPERVISED** (a procedure used when you don't need a decree) to-wit:

- 1) All Petitions, Orders and Notices should contain the wording
UNSUPERVISED.
- 2) You may then disregard all the above items after claims.
- 3) The filing of the Personal Representative's Closing Statement
closes the estate.

The advantage of starting your procedure Unsupervised is that you are not under the Court's supervision. Also, if you discover that you need a decree, you may weave into a supervised administration by filing a Petition for Order of Complete Settlement and all other items listed after said Petition.

INTESTATE

- Filing fee & Atty I.D. No.
- Petition for Adjud. of Intestacy,
and Appt of Admin.
- Order & Not of Hrg on Ptn/Adjud.
and Appt in SUP/USP Admin.
- Affidavit of Mailing
- Affidavit of Publication
- Acceptance & Oath of PR
- Order of Formal Adjud. Intestacy, Det/
Heirs & Appt of PR in SUP/USP Adm.
- Bond (if any)
- Letters of General Administration

- Inventory (w/in 6 months)
- Claims (atty to ck w/Probate Office
after notice requirements)

Can close at this point if Estate remains USP
Close with ICS

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If atty files for Decree, Estate goes SUP
(do SJIS correction form)

- Petition for Order of Complete
Settlement & Decree of Dist.
- Final Account
- If Consents/Waiver filed, (**no need for
Ord/Hrg or AOM)
- Order for Hrg F/Acct **
- Affidavit of Mailing**
- Order Allowing Account
- Order of Complete Settlement & Decree
- Receipts for Residue
(personal property only)
- Petition for Discharge
- Order of Discharge