

Tips for Preparing a Complete and Accurate Informal Application From the Hennepin County Probate Registrars

As mandatory e-filing approaches on July 1 2015, here are some tips for completing an accurate and complete informal application, testate or intestate:

- 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.
- Check for Demands using all name variations on Minnesota Public Access. www.mncourts.gov/caserecords.
- 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 is being filed.
- If only one parent is the heir, provide 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 – provide information of what the Will/Codicil says not just who you want to be the Personal Representative (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 you are filing an application within that time frame, provide names of contingent beneficiaries. Minor contingent beneficiaries within the extended survivorship period will require formal probate or you will need to wait until the time period has elapsed.
- Debts of decedent – **DO NOT LIST SECURED DEBT.**
- Evaluate exempt assets and non-exempt assets compared against debt to verify solvency.
- Do NOT prepare unnecessary documents. The registrars only bond for Hennepin County Economic Assistance. There is no need to file bond waivers. Nominations are NOT required if the applicant is nominated in the Will. The applicant does NOT have to nominate him or herself.
- DO NOT prepare proposed orders and letters. These are completed electronically by the Registrars.

PLEASE PROOF READ AND DOUBLE CHECK SPELLING OF ALL NAMES