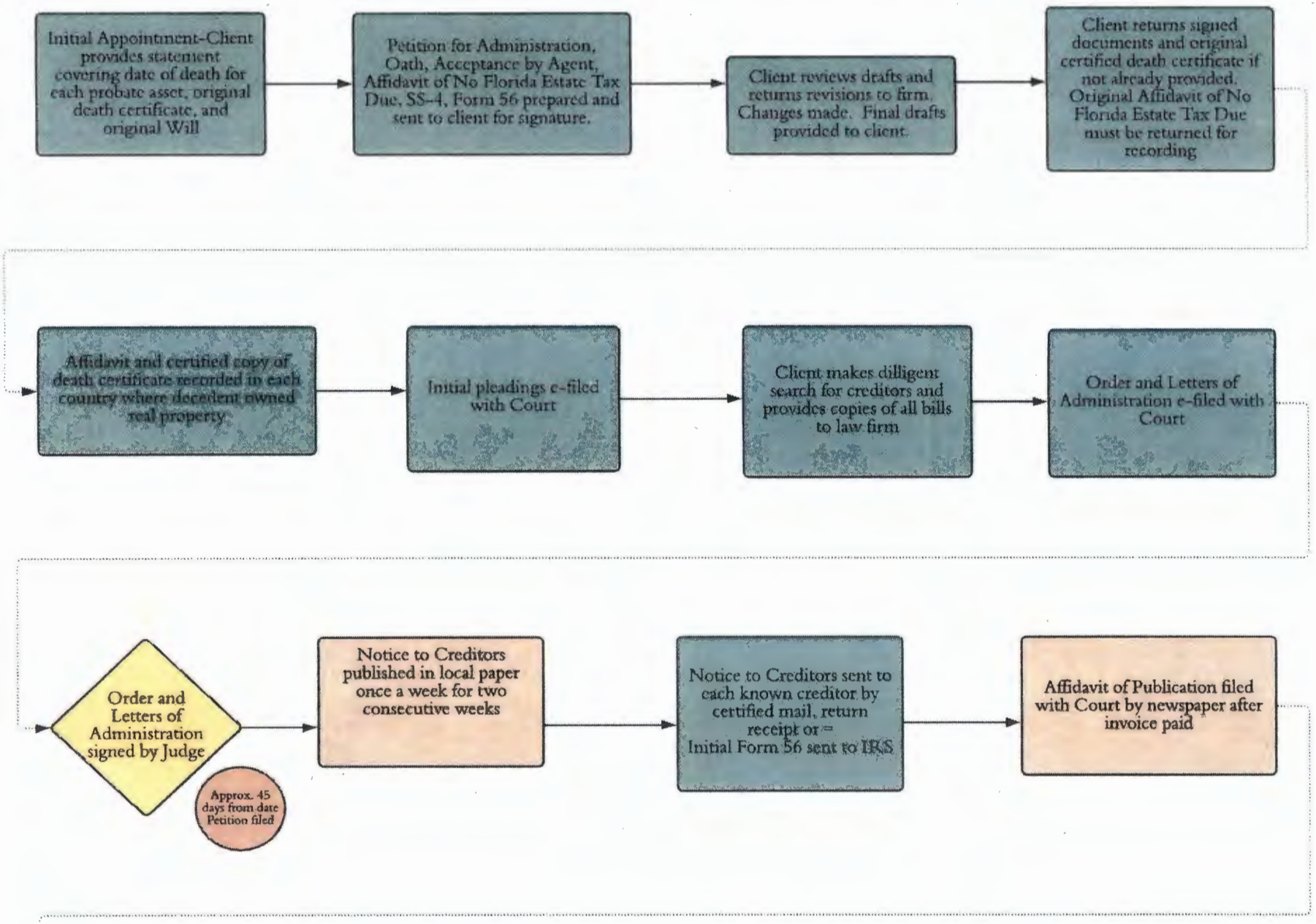
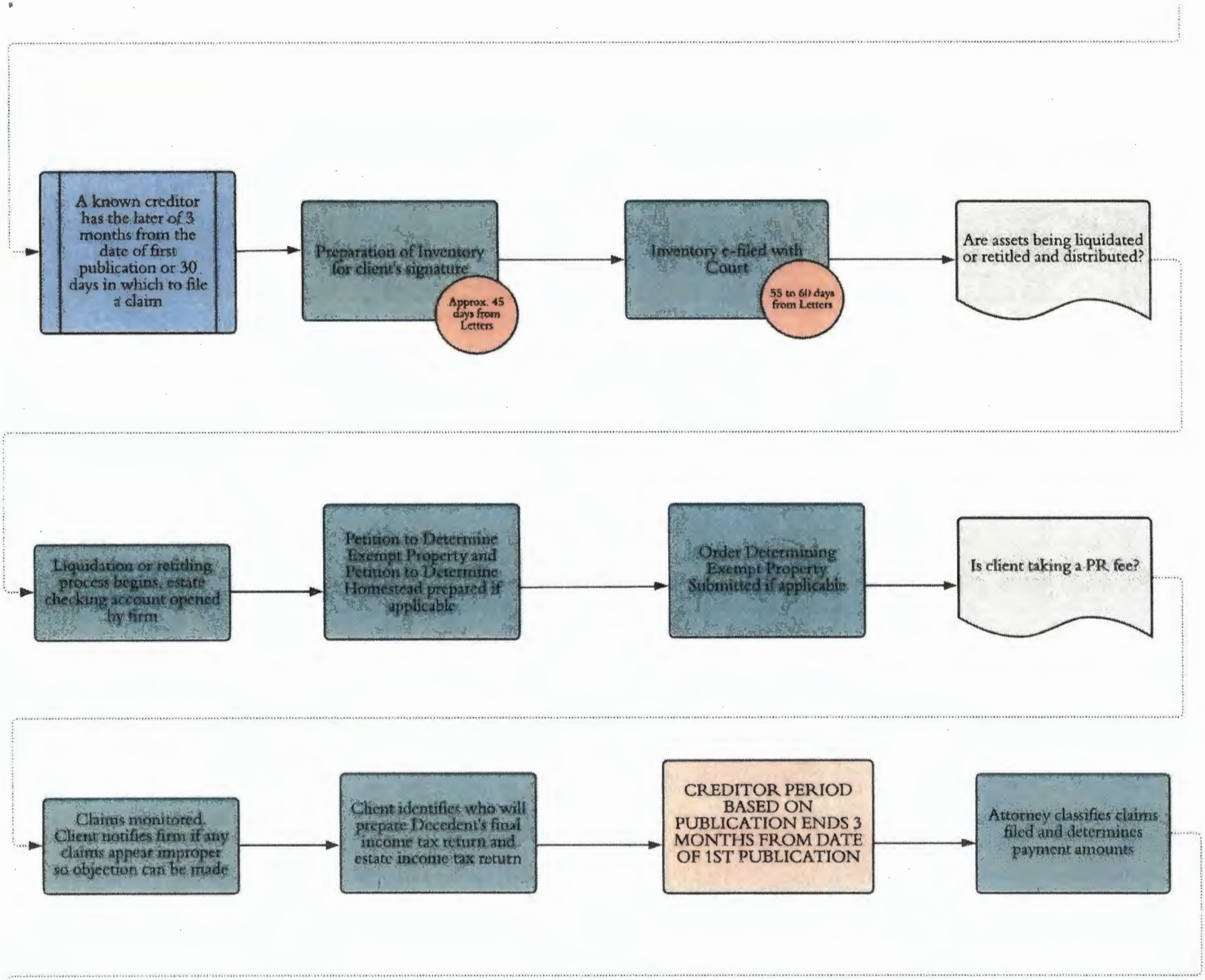
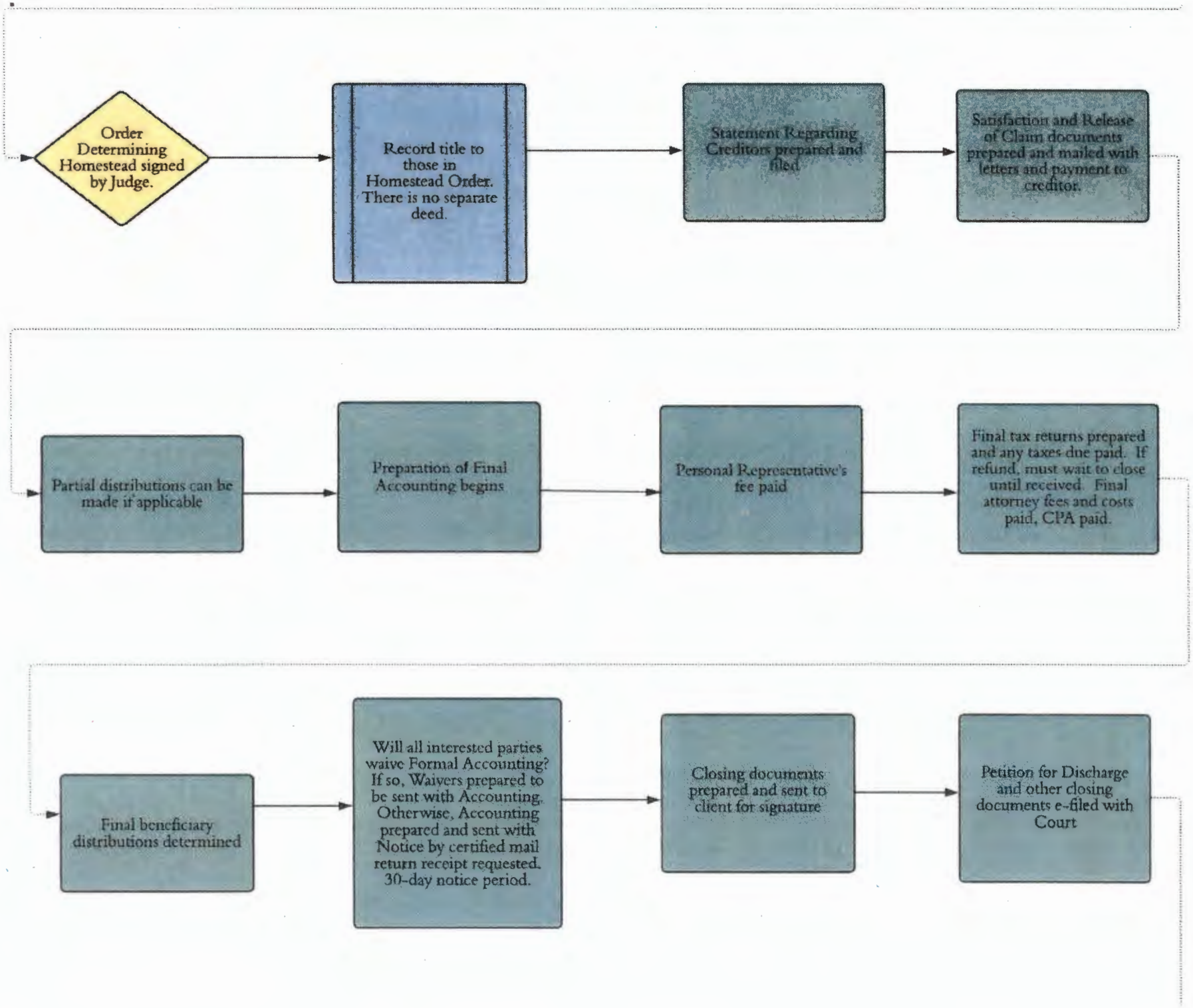
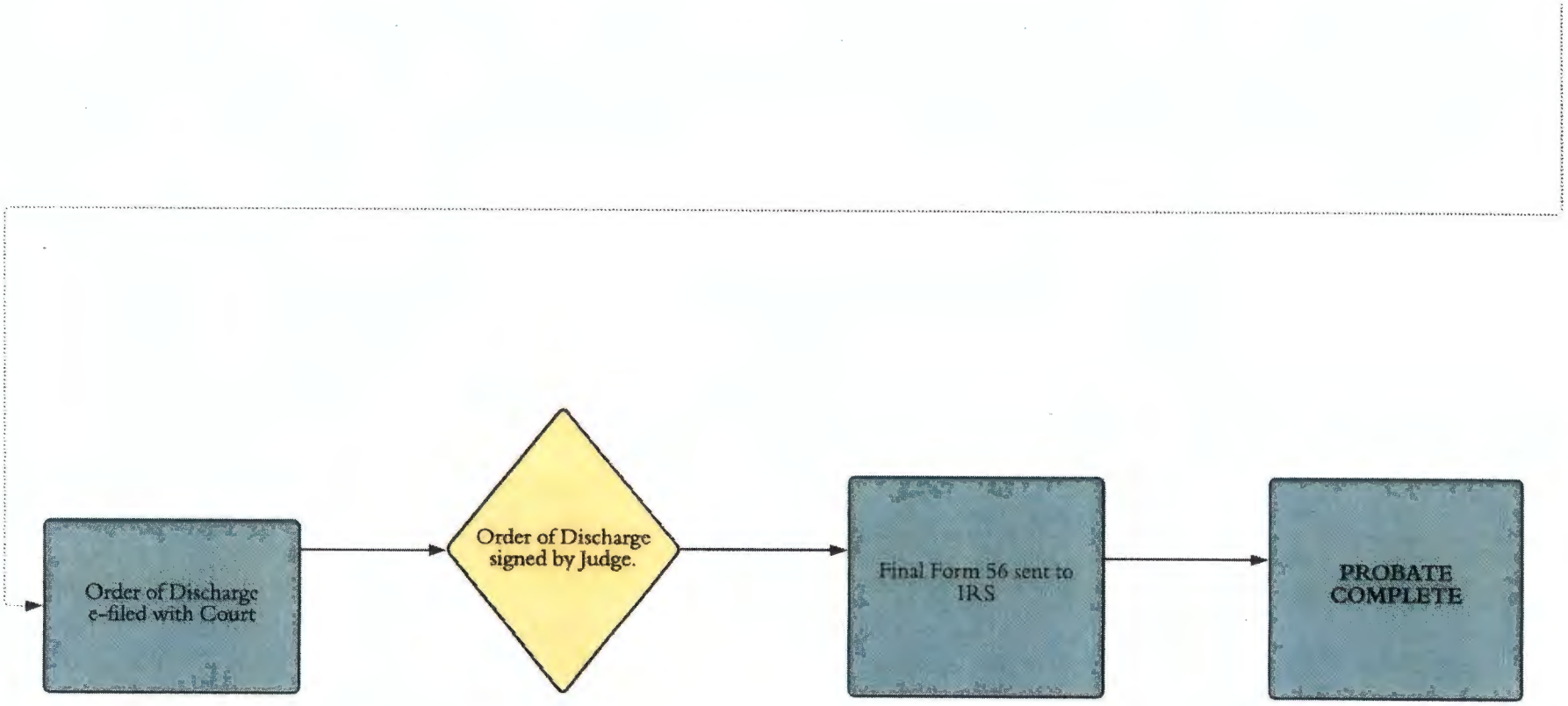
Full Administration Probate with protected homestead- Testate (decedent had Will)




A known creditor has the later of 3 months from the date of first publication or 30 days in which to file a claim
Preparation of Inventory for client's signature
Approx. 45 days from Letters
Inventory e-filed with Court
55 to 60 days from Letters
Are assets being liquidated or retitled and distributed?
Liquidation or retitling process begins, estate checking account opened by firm
Petition to Determine Exempt Property and Petition to Determine Homestead prepared if applicable
Order Determining Exempt Property Submitted if applicable
Is client taking a PR fee?
Claims monitored. Client notifies firm if any claims appear improper so objection can be made
Client identifies who will prepare Decedent's final income tax return and estate income tax return
CREDITOR PERIOD BASED ON PUBLICATION ENDS 3 MONTHS FROM DATE OF 1ST PUBLICATION
Attorney classifies claims filed and determines payment amounts


Order Determining Homestead signed by Judge.
Record title to those in Homestead Order. There is no separate deed.
Statement Regarding Creditors prepared and filed
Satisfaction and Release of Claim documents prepared and mailed with letters and payment to creditor.
Partial distributions can be made if applicable
Preparation of Final Accounting begins
Personal Representative's fee paid
Final tax returns prepared and any taxes due paid. If refund, must wait to close until received. Final attorney fees and costs paid, CPA paid.
Final beneficiary distributions determined
Will all interested parties waive Formal Accounting? If so, Waivers prepared to be sent with Accounting. Otherwise, Accounting prepared and sent with Notice by certified mail return receipt requested. 30-day notice period.
Closing documents prepared and sent to client for signature
Petition for Discharge and other closing documents e-filed with Court


Order of Discharge e-filed with Court
Order of Discharge signed by Judge.
Final Form 56 sent to IRS
PROBATE COMPLETE