



Complete Probate Process Checklist

Stage 1 — Initial Steps After Death

- Secure the decedent ' s home and personal property.
- Gather vital documents (ID, will, trust, marriage license, death certificate).
- Obtain 5–10 certified copies of the death certificate.
- Notify immediate family and beneficiaries.
- Choose an attorney (optional but recommended).
- Determine whether a will exists and locate the most recent version.

Stage 2 — Open the Probate Case

- File the probate petition with the county probate court.
- Submit the will (if one exists).
- Request appointment of the executor or personal representative.
- Notify all heirs and beneficiaries of probate proceedings.
- Executor signs legal acceptance of duties.

Stage 3 — Executor Responsibilities Begin

- Obtain official “ Letters of Testamentary/Administration. ”
- Open the estate bank account.
- Forward decedent ' s mail with USPS.
- Order a full financial snapshot (bank accounts, retirement, insurance, debts).
- Notify Social Security, pension providers, and financial institutions.

Stage 4 — Inventory & Property Assessment

- Complete a court-required estate inventory.
- Document all assets: real estate, vehicles, valuables, accounts, debts.
- Hire real estate agent for probate property evaluation.
- Determine if the property will be sold “ as-is ” or updated first.
- Secure insurance coverage for vacant property (if needed).

Stage 5 — Prepare Property for Market

- Clean out personal items (with family approval).
- Perform necessary repairs or safety fixes.
- Complete a professional property valuation.
- Hire probate-certified agents or vendors.
- Take professional photos and prepare listing materials.

Stage 6 — Selling the Probate Property

- List the property according to court guidelines.
- Review offers and accept the strongest one.
- Submit accepted offer to court if confirmation is required.
- Handle appraisal, inspections, and contingencies.
- Close the sale and deposit funds into the estate account.

Stage 7 — Pay Debts & Final Expenses

- Post required public notice to creditors.
- Review and approve legitimate creditor claims.
- Pay funeral expenses, taxes, outstanding bills, and court fees.

Stage 8 — Distribute the Estate

- Prepare final accounting for all estate activity.
- Submit accounting to the court for approval.
- Distribute remaining assets to heirs according to the will or state law.

Stage 9 — Close the Probate

- File petition to close the estate.
- Receive court order confirming completion.
- Executor responsibilities officially end.

Helpful Contacts

- County Probate Court
- Forward Realty Partners (Probate Real Estate Specialists)
- Probate Attorneys
- Estate Cleanout Vendors
- Financial Institutions

This checklist is provided for informational purposes and is not legal advice.