Probate Quick-Start Checklist

Get Organized. Take Action. Move Forward With Confidence.

Step 1: Secure the Original Will & Death Certificate

☐ Obtain multiple certified copies of the death certificate
☐ Locate the original Will (if there is one)
☐ Confirm whether a trust exists

Step 2: Determine If Probate Is Necessary

☐ Review the size and type of the estate
☐ Look for assets held in joint tenancy, trusts, or with named beneficiaries
☐ Consult a probate attorney for a quick review

Step 3: File the Probate Petition

☐ Identify the court in the county where the decedent lived
☐ Complete and file the probate petition with the court
☐ Submit the Will (if applicable) and death certificate

Step 4: Receive Letters of Administration/Testamentary

☐ Attend or arrange for the court hearing
☐ Receive official documentation authorizing you to act for the estate

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Step 5: Notify All Relevant Parties

☐ Notify heirs and beneficiaries
☐ Publish a Notice to Creditors in a local newspaper
☐ Notify financial institutions, government agencies, and other key contacts

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Step 6: Secure & Inventory Estate Assets

☐ Change locks, stop mail, and secure any vacant property
☐ Gather titles, account statements, and appraisals
☐ Create an inventory of all assets and debts

Step 7: Open an Estate Bank Account

☐ Open an account in the estate's name to pay expenses
☐ Transfer incoming funds to this account
☐ Keep records of all financial activity

Step 8: Pay Debts & Expenses

☐ Review and validate creditor claims
☐ Pay off debts, taxes, and ongoing bills
☐ Keep copies of all payments and communications

Step 9: Prepare for Property Sale (if applicable)

☐ Meet with a probate-certified Realtor
☐ Clean out the property and consider light repairs
☐ List the property and navigate offers with legal oversight

Step 10: Distribute Assets & Close the Estate

☐ Submit a final accounting to the court (if required)
☐ Distribute remaining assets to beneficiaries
☐ File a petition to close the probate case

Bonus: Stay Organized With a Document Checklist

☐ Will / Trust
☐ Death Certificate
☐ Property Deeds & Titles
☐ Insurance Policies
☐ Financial Statements
☐ Tax Returns (last 2–3 years)
☐ Personal Identification for Executor/Administrator

Need Help With the Next Step?
Let's schedule a 15-minute strategy call to clarify your situation and next steps. Schedule Call Here (Link)

Disclaimer:
This checklist is for informational purposes only and does not constitute legal advice. Every probate case is unique. Please consult with an attorney or legal professional for guidance specific to your situation.