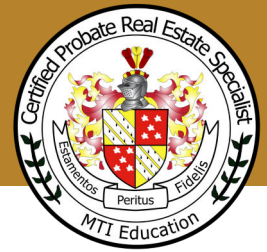


# Probate Timeline

\*This information may vary from state to state



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## MONTH 1: Locate Will and Secure Assets

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1. Request multiple certified copies of the death certificate from the funeral home or the health department.
2. Ensure that all of the decedent's property and valuables are protected (real estate, financial accounts, personal property).
3. Find and review the decedent's will (if any). If no will is found, the estate will be handled as intestate.
4. Notify immediate family, beneficiaries, and important institutions of the death (banks, insurance companies).

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## MONTH 2: File for Probate or Estate Administration

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1. Submit the will to the probate court and file a petition to open probate. If there is no will, petition the court for letters of administration and the appointment of an administrator to begin the estate process.
2. The probate court formally appoints the executor (with a will) or administrator (without a will), granting them authority to act on behalf of the estate.
3. Notify beneficiaries, heirs, and creditors of the probate proceedings (usually by mail or public notice).

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## MONTHS 2-6: Inventory of Estate and Settle Debts

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1. Conduct a thorough inventory of the decedent's assets, including real property, financial accounts, personal property, investments, and business interests. Obtain professional appraisals or valuations for any significant assets (real estate, jewelry, art).
2. Open a separate estate account for the deposit of any estate income and to pay debts and expenses.
3. Review and settle debts of the estate (funeral expenses, medical bills, credit card balances, loans).
4. Notify creditors and allow the statutory period (often 3-6 months) for creditors to file claims against the estate.
5. File the decedent's final individual income tax returns for the year of death. Determine whether the estate is subject to federal or state estate taxes and file the necessary forms (Form 706 for federal estate taxes, if applicable).

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## MONTHS 6-9: Resolve Disputes and Continue Administration

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1. If there are any disputes among beneficiaries or heirs, or claims from creditors or third parties, work to resolve these (sometimes with legal counsel). This may delay the process.
2. Continue managing estate assets, such as maintaining real property, managing business operations, or investing estate funds prudently. Keep beneficiaries informed about the estate's status and any developments.

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## MONTHS 9-12: Prepare and File Final Accounting

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1. Prepare a detailed final accounting of the estate's financial activity, including income, expenses, debts paid, and distributions made. Ensure that all estate expenses, including legal and administrative fees, have been properly documented.
2. Once all debts, taxes, and expenses have been paid, distribute assets according to the decedent's will (for an executor) or state laws (for an administrator). Distribute specific bequests first (if applicable) and then divide the remainder according to the instructions in the will or according to intestate succession laws.

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## MONTHS 12-18: Close the Estate

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1. Once all debts and taxes are settled and assets have been distributed, petition the probate court to close the estate. This step releases the executor or administrator from further responsibilities.
2. Once the probate court formally approves the final accounting and closes the estate, the executor or administrator is officially discharged of their duties.



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