



## Step 1: Gather Necessary Information

You'll need to provide us with:

- The original will or proof that no will exists.
- A certified copy of the "short form" death certificate
- Names and Addresses of relatives

We will:

- obtain your signed agreement
- receive our initial retainer

## Step 2: Signing and Filing All Initial Documents (2-3 Weeks later)

You will sign:

- Petition for Administration
- Other documents necessary to begin

We will

- File all the signed documents along with the Will and Death Cert. We will pay court fees
- Obtain waivers from other heirs or notice if waivers aren't signed.

## Step 3: Administration of the Estate (2 to 4 Weeks After Everything Necessary Filed)

You will:

- Get Appointed as PR by Court
- Get a new Tax ID number for the estate
- Open an estate bank account
- Begin gathering an inventory of estate assets
- Prepare list of assets/debts/expenses and costs incurred .

We will notice creditors', prepare inventory and assist you with managing the estate

## Step 4: Final Procedures

You will provide us detailed information about:

- The estate's total value and a detailed list of assets
- Any changes to the estate's assets.
- Expenses paid and amounts remaining.
- Distributions made to heirs.

We will then:

- Prepare a final accounting and a petition for discharge
- Ask the Court for the distribution of remaining assets and the discharge of the PR.

This Chart is for illustration only. Many things occur during the process that are unique to each case. Creditors, Sales of Real Estate... Make sure you keep us informed every step of the way!