Probate Process:

Executor's (Personal Representative's)

Duties

1. Read Will

Meet With

J LAST WILL

- A. Family Members
- B. Interested Parties
- C. Attorney
- D. Financial Advisor





© Copyright, 2018 Saenger Group, LLC. All Rights Reserved.

6. Distribute and Discharge Estate

- A. Final Accounting
- B. Notify Interested Parties/Heirs
- C. Court Settlement
- D. Distrubute Property
- E. Secure Final Discharge

2. Safeguard Assets

Intermediate

Protective Action

- A. Insurance
- B. Real Property
- C. Business Property
- D. Business Interests
- E. Financial Books/Files
- F. Death Certificate
 - Banks
 - Safe Deposits
 - Credit Cards



5. Administer the Estate

- A. Determine what property
 - Has Been Bequeathed
 - To Sell/Liquidate
 - Worthy of Continuance
- B. Pay All
 - Taxes
 - Estate Expenses
- C. Settle All Proper Claims
 - Publish Notices
 - Collect Evidence
 - Pay Approved Claims

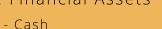
3. Petition For Probate

- A. Proof of Heirs
- B. Locate Witnesses
- C. Administration of Estate Proceedings
- D. Appoint Executor (PR)
- E. Oath of Office



4. Collect Inventory & Appraise Assets

- A. Personal Property
 - Vehicles
 - Furniture
 - Artwork
 - Jewelry/Valuables
 - Collections
 - Household Effects
- B. Financial Assets



- Stocks/Bonds/Mutual Funds
- Retirement Account Assets
- Life Insurance
- C. Real Property
 - Primary Residence
 - Secondary Residence
 - Vacation Home
 - Investment Properties
- D. Business Interests









