

Probate Process: Executor's (Personal Representative's) Duties

1. Read Will

Meet With

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



**USProbate
Court.com**



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CAPITAL PROPERTIES

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6. Distribute and Discharge Estate

- A. Final Accounting
- B. Notify Interested Parties/Heirs
- C. Court Settlement
- D. Distribute 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

- Cash
- Stocks/Bonds/Mutual Funds
- Retirement Account Assets
- Life Insurance

C. Real Property

- Primary Residence
- Secondary Residence
- Vacation Home
- Investment Properties



D. Business Interests