

FORMAL ADMINISTRATION
CHECKLIST FOR OPENING ESTATE

PROBATE CASE NUMBER: _____ **DATE OF DEATH:** _____

ESTATE OF: _____

ATTORNEY OF RECORD: _____

ESTATE: **Testate** _____ **Intestate** _____ **Ancillary** _____

1. Original WILL Filed? YES _____ NO _____ Other _____

2. Death Certificate Filed? YES _____ NO _____

3. Personal Representative - Testate Estate
 Named in Will _____
 Selected by Majority _____ Waivers Attached _____

4. Personal Representative - Intestate Estate
 Spouse _____
 Selected by Majority _____ Waivers Attached _____
 Heir Nearest in Degree _____ Waivers Attached _____

5. Affidavit of Heirs filed? Yes _____ No _____

6. BOND Approximate Value of Probate Assets \$ _____
 Waive by Will _____
 Waive by Beneficiaries _____ Waivers Attached _____
 Motion to Waive Bond Filed with Court _____
 Court to Consider Bond _____

7. Has Notice Been Given of Petition for Administration to all Interested Persons?
 Yes _____ No _____

As Attorney for the Personal Representative, I CERTIFY this _____ day of _____, 2011, that I have personally reviewed the foregoing checklist and it is accurate.

CLERK'S NOTES:

Attorney for Estate
Attorney's Mailing Address:

Telephone:
