



BROWN & ZOHAR LAW

Getting started in the Probate process

Let us begin by saying how very sorry for your loss. We realize the probate process can be very taxing on families and we hope to reduce the frustration in this lengthy detailed process. We will, however, need your assistance to move forward through the State mandated process. Attached is a general guideline that outlines the documents needed to begin handling the affairs of your family's estate, in your role as the personal representative. In order to keep the process moving, we need you to work with us to compile a formal inventory of the estate. As your attorney, I will work with you in preparing the formal inventory and preparing the necessary documents that need to be filed.

Please send us a list of the property in the, with reasonable detail, and corresponding source-documentation for each listed item. The list must include the items estimated fair market value *at the date of the decedent's death*. The list may include, but is not limited to, the following types of properties:

1. Automobile
2. Real estate
3. Investment accounts
4. Bank accounts
5. Personal belongings
6. Anything else owned in the name of the decedent
7. List of debts owed to the decedent, *if any*

Please provide statements from the source (i.e. bank institution) with the date of death value to be included on the Inventory, within 30 days of your appointment as personal representative. The deadline for filing the Inventory is 60 days from your appointment as Personal Representative. You will need to get documentation from the source as to the date of death value along with the bank statement. We will prepare the Inventory for your signature upon receipt of the statements from you.

In addition to the above documentation, we need copies of the following:

- 3 certified copies of the death certificate
- Will or Codicil (if any)
- Trust documents (if any)
- Paid funeral/hospital bills
- Copies of monthly bills to Decedent (don't forget online & Auto-pay bills)
- Recent bank statements
- Copy of life insurance policy, if applicable
- Tax returns for the past 2 years
- Copy of title for car
- Copy of deed for all properties owned
- Writing indicating instructions for distribution of tangible personal property
- Storage unit agreement, if applicable

Of course, if you have any questions please do not hesitate to contact our office.

Best personal regards,