

ONLINE COMPANION

PROBATE FILE LIST

A number of documents can be found in a probate file. Here is a list of the most common documents that you must have or that are helpful, if not essential, in the probate process.

1. The will
2. The Petition for probate
3. The letters testamentary or letters of administration
4. The bond of the executor or administrator, if required
5. Letter or letters of instruction of the deceased
6. A list of heirs or beneficiaries
7. Proof of notification to heirs or beneficiaries and to other parties of interest, including creditors
8. An inventory of the deceased's estate
9. An inventory of nonprobate property held by the deceased
10. A list of debts of the deceased
11. Proof of payments of debts
12. The deceased's final income tax return
13. The deceased's estate tax return
14. Tax return or returns of the estate
15. Proof of payment of all taxes
16. Copies of the distributions
17. Receipts for the distributions
18. Final accounting, approved by the court

While other documents certainly will be needed in many estates and should be included in the file, this list will certainly get you started in organizing the probate process.