



## **ESTATE ADMINISTRATION PROCESS**

### **STEP ONE: Probate Consultation**

At Tupper Butler Law, we know all too well the difficulty that comes with the loss of a loved one. At the Probate Consultation, we want to relieve you of the anxiety that often comes with trying to settle a loved one's affairs after their death. We discuss how we can help support you in this difficult time, review your responses to the Probate Questionnaire, and demystify the probate process.

### **STEP TWO: Opening the Estate**

After we collect the necessary information from you, we draft the Petition and other documents for signature, then file the Petition (with the original will if one exists) in probate court to formally open the estate. The court then sets a hearing date to appoint the executor or personal representative.

### **STEP THREE: Appointment of Personal Representative**

At the probate hearing, the court will review the Petition and the original will, if available, to formally open the probate process. The court then appoints an executor or personal representative to oversee administration of the estate. After the court appointment, we hold a Fiduciary Responsibility Meeting to explain your role and responsibilities as estate representative, the statutory timeline for probate administration, and answer any questions you have as we begin to administer the estate.

### **STEP FOUR: Probate Administration**

Formal administration of the probate estate begins with court appointment of the personal representative and continues for a statutory minimum of six months. During this time, we work with you to collect financial information about the estate (e.g., bank accounts, investments, life insurance, annuities, etc.), file the proper inventory with the court, and resolve any claims or debts of the estate.

### **STEP FIVE: Settlement Preparation**

Once administration is complete, we assist you with the final accounting and distribution of estate assets to beneficiaries in accordance with the will or applicable law. If any disputes arise, we work with you to find a resolution that allows informal settlement to take place in probate court.

### **STEP SIX: Estate Closure**

Once all claims are paid and assets properly distributed, we submit final settlement information to the court and request closure of the probate estate. The court orders closure on satisfactory review and officially terminates the fiduciary role of the executor or personal representative.