

**FORMAL ADMINISTRATION**  
**CHECKLIST FOR OPENING ESTATE**

(All orders provided to the court must show the persons to whom the order is copied; and self-addressed stamped envelopes (with no return address) shall be provided for mailing)

**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 on \_\_\_\_\_  
(date) that I have personally reviewed the foregoing checklist and it is accurate.

CLERK'S NOTES:

\_\_\_\_\_  
Attorney for Estate  
Attorney's Mailing Address:  
\_\_\_\_\_  
\_\_\_\_\_  
Telephone: \_\_\_\_\_