



MOTEN & ASSOCIATES

Get Ready to Handle Your Own Probate

While probate can be a complex and time-consuming process, being prepared can make it more manageable.

Whether you're an executor or simply assisting with the process, understanding the key steps ahead of time can help you stay organized and avoid common pitfalls.



(213) 943-1466



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Checklist: Things to Do to Get Ready to Handle Your Own Probate



1. Confirm the need for probate

Determine if probate is necessary (are any assets owned jointly, or are there payable-on-death accounts?)

2. Assess the total value of the estate

Is the estate money/property worth less than \$184,500? If so, you need to do a small estate probate.

3. Locate the will (if any)

Find the decedent's original will. Ensure the will is valid (handwritten or typed & signed by 2 witnesses).

4. Make a list of all potential heirs

(If no will) or beneficiaries named in the will and get the addresses of all of the beneficiaries/heirs.

5. Make copies

Get at least 3 copies of the original death certificate for the decedent.

6. Collect unpaid bills

Collect any and all unpaid bills owed by the decedent, including presently owed taxes.

7. Collect documents

Collect all deeds, titles, and account statements belonging to the decedent.