

# Checklist For A Successful Probate Proceeding

Do you have a probate proceeding but are unsure what to do about it?  
**This free checklist was created just for you by Barbara M. Pizzolato, P.A.**

1. Locate the original estate plan and obtain ten death certificates. 

2. Hire an experienced probate attorney to handle the estate. 

***Steps 3-14 will be handled by your attorney. If you go this on your own, you will be personally liable for any mistakes.***

3. Identify, gather, value, and safeguard the decedent's probate assets. 

4. Publish a "Notice to Creditors" in a local newspaper in order to give notice to potential claimants to file claims in the manner required by law. 

5. Serve a "Notice of Administration" to provide information about the probate estate administration and notice of the procedures required to be followed by those having any objection to the administration of the decedent's probate estate. 

6. Conduct a diligent search to locate "known or reasonably ascertainable" creditors, and notify these creditors of the time by which their claims must be filed. 

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7. Object to improper claims, and defend suits brought on such claims.
8. Pay valid claims.
9. File tax returns and pay any taxes properly due.
10. Employ professionals to assist in the administration of the probate estate; for example, attorneys, certified public accountants, appraisers and investment advisors.
11. Pay expenses of administering the probate estate.
12. Pay statutory amounts to the decedent's surviving spouse or family.
13. Distribute probate assets to beneficiaries.
14. Close the probate estate.



ATTORNEY AT LAW

 **BARBARA M. PIZZOLATO, PA**

ESTATE PLANNING  
TRUST ADMINISTRATION  
PROBATE  
BUSINESS PLANNING



Your family's future may not yet be protected. Contact our offices to get the probate assistance you need today.