

THE FOLLOWING ARE REQUIRED FOR ESTATE ACCOUNTS:

Please be sure you have enough on deposit to file an account

Costs associated with filing an Estate Account:

\$40	Account Forms (13.0 and 13.1)
\$1	Each additional page to be filed (including closing statements/affidavits)
\$2	(Per page) Waivers (13.7) and Notice of Hearing (13.5)
\$10	Application to Extend (13.81)
\$7	Report of Newly Discovered Assets
\$27	Waiver of Partial Account (13.4) + Application to Extend (13.81)
\$17	Certificate of Termination

_____ Notice of Retrieving Documentation for Accounts - **Form 213.81. (Effective 3/7/2022)**

_____ Certificate of Service - **Form 2.4** (close after 3 months) (If testate estate)

_____ Inventory filed and approved.

_____ Application for Sale/Transfer of Motor Vehicle (**Form 9.4**).

_____ List of non-probate assets filed (**Form 231.23**) if amount used for fee calculation.

_____ Report of Newly Discovered Assets for any assets not listed on approved inventory (self-generated form).

_____ Satisfaction or Release of **Claims** that were filed within 6 months of DOD.

_____ If no will and there is real estate, make sure **Consent(s) to Sell Real Estate** have been filed by heirs or a Complaint to Sell Real Estate has been filed & completed.

_____ **Closing statement or Certificate of Transfer.**

_____ **Consent(s)** to Attorney fees for final account (**Form 210.05**). **Application & Entry** if no consents (only application and entry accepted for partial accounts)

_____ Distributions made per Will, Will Codicil, or Statute

_____ **Form 13.9** REQUIRED FOR EVERY ACCOUNT (if D.O.D. after 2001)

_____ **Form 13.81** (App to Extend for Partial Account)

_____ Backup documents (**ALL** bank statements for the account period, proof of distributions, cancelled checks, receipts. **NO CASHIERS CHECKS ALLOWED** per Local Rule 64.1).

_____ Account signed by fiduciary, co-fiduciary, **must original signatures.**

_____ Waivers and/or Affidavit of Proof of Service of Notice of Hearing on Final Account by all residual beneficiaries (due by the hearing date) **Must be original signatures.**

_____ **PROOF OF PAID FUNERAL BILL** required for final account.

_____ Entry Setting Hearing On Account (**Form 213.8**)

_____ Entry Approving and Settling Account (**Form 13.3**)