

THE FOLLOWING ARE REQUIRED FOR ESTATE ACCOUNTS:

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

**Please confirm costs amounts with the cashier since filing fees may have changed.**

- \_\_\_\_\_ 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** (Application to extend time 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 be 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**)