

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 Waivers (13.7) and notice of hearing (13.5)
- \$5 Application to Extend (13.81)
- \$7 Report of Newly Discovered Assets (\$1 additional pages)
- \$17 Waiver of Partial Account (13.4) + \$5 for Application to Extend (13.81)
- \$17 Certificate of Termination (\$1 for each additional page)

- _____ Certificate of Service- Form 2.4 (close after 3 months) (If testate estate)
- _____ Inventory filed and approved
- _____ 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. **Application & Entry** if no consents (only app/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)
- _____ Proof of distribution (cancelled checks, bank statements or receipts)
- _____ Account signed by fiduciary, co-fiduciary, 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

NOTE: if back-up documents need to be returned, please include a self-addressed stamped envelope, or note a mailbox number for the account clerk. They will be shredded if neither are included.