

THE FOLLOWING ARE REQUIRED FOR ESTATE ACCOUNTS:

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

Please **NOTE**: this is **NOT** a complete list of all needed documents depending on the specifics of your case and only meant to assist you.

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 (**Form 106.11**).
- _____ Satisfaction or Release of **Claims** that were filed within 6 months of DOD for Final Account. 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

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

- _____ Entry Setting Hearing On Account (**Form 213.8**)
- _____ Entry Approving and Settling Account (**Form 13.3**)