



Probate Procedures

Duration/Timeline

Prepare and File Petition for Probate	Process begins
Court hearing on the Petition for Probate	30-45 days after filing the Petition in Ventura County. 60-90 days for LA Count.
Following the issuance of an Order for Probate, you will need to file your Duties and Liabilities, a bond (if required), and have Letters Testamentary or Letters of Administration issued.	Immediately after the order is signed.
Notice to ALL known Creditors	Within 30 days of the Order for Probate being issued.
Notice to Department of Health Care Services (if the Decedent had Medi-Cal)	Within 30-60 of the Order for Probate being issued.
Obtain a Federal Tax Identification Number (EIN) for the Estate	Within 30 days of the Order for Probate being issued.
Prepare and submit to the Probate Referee an Inventory and Appraisal of ALL assets in the Estate other than cash.	3-4 Months
Allow or Reject Creditor Claims	6-9 Months
Notify Department of Corrections (if the Decedent, or any beneficiary, has been incarcerated in the State of California.)	Prior to the close of probate.
Notify and obtain from the Franchise Tax Board a letter that there are no state taxes due from the Decedent.	Prior to the close of probate.
File all state and federal returns for the Decedent for the year of death, and the estate (if necessary)	Prior to the close of probate.
Preliminary Distributions (if necessary will need court approval)	(Discuss with your attorney)
File Petition for Final Distribution and Accounting	Within 12 months
Hearing on Petition for Final Distribution and Accounting	30-45 days after filing the Petition for Final Distribution in Ventura County. 60-90 days for LA County.
Order approving Final Distribution and Accounting	Order issued by court following hearing.
Distribution of Assets to Heirs following Final Order on Distribution	Pursuant to court order
Ex Parte Application for Final Discharge	After all Distributions completed.
Final Discharge Order (indicates close of probate case)	Process ends