

Probate Timeline

Months 1-2	Prepare and File Petition for Probate
Months 2-3	Court hearing on the Petition for Probate Obtain EIN (tax ID Number) and Bank Account for the Estate
Months 2-4	The following are issued: Letters of Administration/Authority Orders for Probate Duties and Liabilities Issue Bond (if ordered) Notice to Creditors Initiated
Months 2-4	Begin the process of Selling Real Estate Sign Listing Agreements Estate Sales / Donations / Disposition of Personal Property Clean and Repair the Property (if necessary) Sell the Real Estate Deposit funds into Estate Account for expenses and creditors
Months 4-8	Notice to Department of Health Services Inventory & Appraisalment
Months 6-12	Pay State and Federal Taxes (if necessary) Allow or Reject Creditor Claims Possible Preliminary Distributions Notice to Department of Health Services (if deceased received medical) Notice to Franchise Tax Board (if heir is out of state)
Months 6-15	Claim of Exemption (if assets transfer to a minor)
Months 6-18	Receive Final Tax Letter from State and Federal (if appropriate)
Months 8-16	File Petition for Final Distribution and Accounting Hearing on Petition for final Distribution and Accounting Order Approving Final Distribution and Accounting
Months 9-17	Distribution of Assets to Heirs
Months 9-18	Final Discharge Order (indicates close of probate case) Final Distribution of Funds