

## **Summary Administration Checklist**

### **Does the estate qualify?**

1. Did the deceased live in Polk County?
  - If yes, go to question
  - If no, the petition must be filed in the county where the deceased lived.
2. Are the estate's assets, both real and personal, equal to or less than \$75,000?
  - If yes, the estate qualifies.
  - If no, go to question 3.
3. Has the decedent been deceased more than 2 years?
  - If yes, the estate qualifies.
  - If no, the estate does not qualify.

### **Are you ready to file?**

1. Do you have a certified copy of the death certificate?
    - If yes, go to question
    - If no, please provide the proper documentation.
  2. Have you completed the required Affidavit of Heirs?
    - If yes, go to question 3.
    - If no, please complete before moving forward.
  3. Did the deceased leave a will?
    - If yes, go to question 4.
    - If no, skip to question 5.
  4. Do you have the original will?
    - If yes, (make sure you deposit it with the clerk) go to question 5.
    - If no, please locate and file the original will.
- (Make sure you file a Petition to Admit Will)
5. Is the entire petition completed, including correct beneficiaries, all assets and values, any creditors, and proposed distribution of assets?
    - If yes, go to question 6.
    - If no, please complete the petition in its entirety.
  6. Is the estate indebted (any claims on the estate)?
    - If yes, go to question 7.
    - If no, skip to question 8.
  7. Have you formally noticed the creditors through certified mail and received proof of service such as a green card?
    - If yes, go to question 8.
    - If no, formally noticed the creditors through certified mail and received proof of service such as a green card.
  8. For intestate estates (without a will), are there any individuals or beneficiaries, such as children or siblings of the deceased, that should be made aware of this petition?
    - If yes, go to question 9.
    - If no, skip to question 10.
  9. Have they reviewed the petition and signed a Joinder/Waiver form?
    - If yes, go to question 10.

If no, formally notified the beneficiaries through certified mail and receive proof of service such as a green card.

10. If you wish to distribute personal property such as bank accounts, insurance policies, or stocks, have you provided a recent statement reflecting the current amount or value?

If yes or not applicable, go to question 11.

If no, please provide the proper documentation.

11. If you wish to distribute personal property such as a vehicle, have you provided the title or documentation including the VIN?

If yes or not applicable, go to question 12.

If no, please provide the proper documentation.

12. If you wish to distribute real property, have you provided the deed with a full legal description?

If yes or not applicable, you have provided all the required information.

If no, please provide the proper information.

**If you have answered yes to all questions that applies to the estate, then you are ready to file.**

**Please remember that providing all required information does not guarantee that your petition will be granted. The court will review the filings and may require additional information.**