

## Procedures: What to do after you are appointed Personal Representative

Use this packet only if you have been appointed the Personal Representative of the Estate in an Informal Probate proceeding.

### **STEP 1.** Notify Interested Persons:

- A. Within 30 days of your appointment and the issuance of letters, you must send by certified or registered mail or deliver a copy of the following to everyone entitled to notice, including all interested persons:
  - Notice of Appointment and/or Admission of Will
    - If your case involves a will, check the boxes that say appointment and admission, otherwise only check the boxes that say appointment of personal representative.
    - If there is a will, attach a copy of the will to the notice.
  - Order to Personal Representative
- B. File Proof of Notice with the Clerk of Superior Court:
  - Complete and file the Proof of Notice with the Clerk of Superior Court.

### **STEP 2.** Notify Creditors:

- A. A creditor is a person or entity to whom the decedent owed money. You are required to give notice directly to any creditors you know about. You are also required to publish notice in a newspaper in case there are creditors you do not know about.
- B. Complete the Notice to Creditors included in this packet and mail to all creditors you know about. File the original Notice to Creditors with the Clerk of Superior Court.
- C. Publish the Notice to Creditors in a newspaper of general circulation in Maricopa County once a week for 3 weeks in a row. Use the letter in this packet to help you. (The newspaper will usually file the original affidavit of publication and return a copy to you. If the newspaper returns the original affidavit of publication to you, file it with the Clerk of Superior Court.)
- D. Complete the Proof of Notice to Creditors and file the original with the Clerk of Superior Court.

### STEP 3.

#### Initial Tasks to Handle the Estate:

##### A. Inventory and Appraisal of Assets in The Estate:

- Within 90 days after your appointment as personal representative you must prepare an inventory of property owned by the decedent. You must:
  - 1) List the property with reasonable detail,
  - 2) Estimate its fair market value,
  - 3) Indicate whether it was held as community or separate property, and
  - 4) What kind and amount of any encumbrances/liens might exist on the property.

You can hire an appraiser to determine fair market value if there is reasonable doubt about some asset. Be sure the appraiser is qualified and disinterested. List the name(s) and address(es) of the appraisers on the inventory, and list which item(s) was/were appraised.

- After the inventory is completed, do one of the following:
  - 1) File the inventory with the court and send copies to any interested person who requests it, OR

Warning: This form is identified as a “Confidential Document.” Please refer to the “Special Handling for Confidential Documents,” (form PB13h) included within this packet for instructions on how to properly file this form.

- 2) You can choose not to file the inventory, but then you must deliver or mail a copy to each of the heirs or people named in the will and any other interested person who requests it.

Note: at any time while you are administering the estate you realize that you failed to list some item in the inventory or the value or description of the asset was wrong, you must file a supplementary inventory with the new information. You must then file it with the court and give copies to interested parties who request it only, or if you choose not to file it, then give copies to all interested persons.