

PROCEDURES FOR APPOINTMENT OF PERSONAL REPRESENTATIVE AND ADMISSION OF WILL (if any) TO PROBATE

STEP 1 VIEW REQUIRED TRAINING MATERIALS **BEFORE** YOU FILE!

View the required training information so that you may turn in the **Certificate** (or "Declaration") of **Completion of Training** at the same time you file your Application and other papers for appointment as personal representative of the estate of the person who died ("the decedent"). See the "**Notice Regarding Training Requirements**" in this packet for more detailed information, but note that you may access and complete the training FREE online at:

<http://www.azcourts.gov/probate/Training.aspx>

STEP 2 BRING PAPERS TO COURT, PAY FILING FEE, and FILE:

Bring the documents listed below to the Filing Counter at the court location you choose for filing, and pay **the filing fee**. Cash, AMEX/VISA/MasterCard debit or credit cards, or money order made payable to the "Clerk of Superior Court" are acceptable forms of payment.

A list of current fees is available from the Law Library Resource Center website or from the Clerk of Court's website.

If you cannot afford the filing fee and/or the fee for having the papers served by the Sheriff or by publication, you may request a deferral (payment plan) when you file your papers with the Clerk of the Court. Deferral Applications are available at no charge from the Law Library Resource Center.

The Clerk will accept the **originals** to be reviewed by the Probate Registrar or Deputy Registrar **within 3 business days** after the date of submission.

Make and present extra copies of all originals for the Probate Registrar to date-stamp and return to you as proof of filing.

REQUIRED DOCUMENTS:

- **PROBATE INFORMATION COVERSHEET**
- **INFORMAL CHECKLIST**
- **APPLICATION FOR APPOINTMENT** (Signed and notarized original plus at least one copy)
- **Original WILL**, *if decedent had a Will*
- **NOTICE OF APPLICATION** (original plus at least one copy)

- **PROOF OF MAILING OF NOTICE OF APPLICATION** (original plus at least one copy)
- **DECLARATION SUPPORTING PUBLICATION** (includes **AFFIDAVIT OF PUBLICATION** (if you published) (original plus at least one copy)+
- **STATEMENT OF INFORMAL APPOINTMENT** (original plus at least one copy)
- **LETTERS and ACCEPTANCE OF APPOINTMENT** (Signed original plus at least one copy)
- **ORDER TO PERSONAL REPRESENTATIVE** (Signed original plus at least one copy)
- **CERTIFICATE** (or "Declaration") **OF COMPLETION OF TRAINING** (original plus copy)
- **OPTIONAL DOCUMENTS:**
 - Signed and notarized original **WAIVER OF RIGHT TO APPOINTMENT and CONSENT** (if anyone signed) (plus at least one copy)
 - Signed and notarized original **WAIVER OF BOND** (if anyone signed) (plus at least one copy)

STEP 3 Before you make any copies, complete the **STATEMENT OF INFORMAL APPOINTMENT** except for the part about the bond and the signature of the Probate Registrar. **Use Black Ink Only.** Also, complete the caption of the **LETTERS** and the caption of the **ORDER TO PERSONAL REPRESENTATIVE**, which includes the information about you and the decedent (the person who died).

STEP 4 If all is in order, the Probate Registrar will:

- **Sign the STATEMENT,**
- **Submit the WILL (if there is one),**
- **Issue the LETTERS OF APPOINTMENT, AND**
- **Sign the ORDER TO PERSONAL REPRESENTATIVE.**

STEP 5 Once reviewed by the Probate Registrar you will be contacted based upon information provided to us on the contact information sheet and notified that the documents are ready for pickup. If documents are deficient, you will be notified and you may resubmit upon correction of deficiencies.

Documents must be picked up within 24 hours (1 business day) of notification.

STEP 6 If you are required to post a bond, the Clerk **will not** issue the **LETTERS** until you have filed proof of the bond. After you file proof of the bond the **LETTERS** will be issued by the Clerk.

STEP 7 You will need to get a certified copy of the **LETTERS**, to prove you were appointed. There is a **certification fee plus a fee per page to make copies**. Also ask the Probate Registrar to date-stamp ("conform") a copy of the **STATEMENT OF INFORMAL APPOINTMENT** for you.