

YAVAPAI COUNTY
Self-Service Center

INSTRUCTIONS: HOW TO FILL OUT THE CLOSING STATEMENT

CLOSING STATEMENT. The Personal Representative of the Estate must complete this form to close the Estate. Follow these steps:

STEP 1:

1. **Caption:** Fill in your name, address, city, state, zip code, and telephone number. Next, write in the name of the person who died and the court case number.
2. **Appointment as Personal Representative.** Fill in the date you were appointed to be the Personal Representative of the Estate.
3. **Notice to Creditors.** If you filed a Notice to Creditors and published the notice in the newspaper, fill in the date of the first publication to the creditors.
4. **Inventory and Appraisalment.** Check one of the first two boxes that fits the circumstances of how the inventory was filed or mailed. Check the third box if you filed a Proof of Mailing (Proof of Mailing Inventory is required by Arizona law).
5. **Administration of Estate.** List the names of any creditors or other claimants whose claims against the Estate are not barred or who were not paid. If there were none, write in "none" in the space provided.
6. **Distribution of Assets.** This statement tells the court that you have distributed all of the assets of the Estate to the persons entitled to distribution.
7. **Mailing Closing Statement.** Make sure you mail a copy of the Closing Statement to all of the people you distributed property of this Estate, to all people whose interests were affected by the administration of the Estate, and to all creditors or claimants of whom you are aware that were not paid or claims were not barred.
8. **Account.** Furnish a full account in writing of your administration to the distributees whose interests are affected thereby and mail or deliver a copy of the account to them. Unless all such persons have signed Waivers of the Account and the Waivers have been filed with the court, the Account must be filed.
9. **Claims.** If you put "none" in paragraph 5, fill in "none" in this space, too. If you listed creditors or other claimants in paragraph 5, set forth the arrangement made to pay each creditor or claimant.

Signatures: You must sign the Closing Statement in front of a Notary Public. The Notary Public must also sign and date the Closing Statement.

STEP 2: See the Self-Service Center instruction form called PROCEDURES: HOW TO CLOSE THE ESTATE