

WHAT TO DO AFTER YOU ARE APPOINTED PERSONAL REPRESENTATIVE

Read all instructions before beginning.

NOTICES YOU MUST SEND AND PLEADINGS YOU MUST FILE AFTER THE LETTERS ARE ISSUED

1. Within 30 days after your Letters of Appointment are issued, you must mail notice of your appointment to the Arizona Department of Revenue and to the heirs and devisees whose addresses are reasonably available to you.
2. **Only if there is a Will - attach a copy of the Will to the Notice**
3. Complete the Proof of Delivery/Mailing of Notice of Appointment and file with the Probate Registrar.
4. Within 30 (thirty) days of your appointment, you must mail a copy of the "Order to Personal Representative and Acknowledgment and Information to Heirs/Devisees" to all the heirs and devisees of the estate, and to any other persons who have filed a demand for notice.
5. Within 45 (forty-five) days of your appointment as Personal Representative, you must file with the Court a notarized statement swearing that a copy of this Order was mailed to each devisee, to each heir in intestate (no will) estates and to any other persons who have filed a demand for notice.
6. Complete the Notice to Creditors included in this packet to mail or hand-deliver to all creditors you know about.
7. You must also publish the Notice to Creditors, in case there is a creditor who is not aware of the death, who may want to make a claim. Publish in a newspaper of general circulation in this county once a week for three weeks in a row. Use the letter in this packet to help you.
8. After the newspaper returns the Affidavit of Publication to you, file with the Court a completed copy of the Proof of Notice to Creditors and the newspaper's Affidavit of Publication.

INVENTORY AND APPRAISEMENT OF ASSETS IN THE ESTATE:

1. Within 90 days after the appointment, you must prepare an inventory of property owned by the decedent at the time of death. List the property with reasonable detail and give its estimated fair market value as of the date of decedent's death, whether it was held as community or separate property, and what kind and amount of encumbrances on the property might exist.

You can employ an appraiser to help determine fair market value if there is reasonable doubt about some asset; but if you do, be sure the appraiser is qualified and disinterested. List the name and address of appraiser(s) on the inventory, and list which item he/she appraised.

► If a personal representative is unable to comply with the deadline (90 days after the date of appointment) set forth in the AZ Rules of Probate Practice, Rule 31 (A)(1)(a)(b), the personal representative **shall, before the deadline** file a motion that requests an extension of the deadline. The motion shall state why additional time is required and how much additional time is required. Packet #62(b) Requesting Additional Time to File Inventory can be obtained in the Law Library or Clerk of Court locations.

2. After the inventory is completed, do **one** of the following:
 - a. You may file the inventory with the Court and send copies to interested persons who request it, **OR**
 - b. You can choose not to file it, but you must then hand-deliver or mail a copy of the inventory to each of the heirs or people named in the Will and any other interested persons who request it. Complete the Proof of Mailing of Inventory and Appraisalment in this packet.
3. If at any time while administering the estate you realize you failed to list some item in the inventory, or the value or description of the asset was wrong, you must prepare a supplemental inventory with the new information and file it with the Court, or provide copies to all interested persons.

PROCEED WITH ADMINISTRATION AND CLOSING

Now you are ready to go on to the next steps -- Administration and Closing of the Estate. When the Estate business has been concluded and the remaining assets have been distributed, the Estate is ready to be closed. Complete Packet # 94(b) included with this packet.

NOTE: If the Estate business has not been fully concluded and the assets distributed within one (1) year after appointment of the Personal Representative, you will need to file an Estate Status Report, and the Court may require that an account be filed. If you need to file either an Estate Status Report or an account (annual or final), forms and instructions are available in Packet #95. Packet #95 is available in the Law Library or Clerk of Court locations.