THE FORMAL PROBATE PROCESS:

Detailing the responsibilities of Attorneys and Personal representatives in Florida's Formal Administration Process



WHAT TO EXPECT IN YOUR FORMAL ADMINISTRATION

PERSONAL ATTORNEY REPRESENTATIVE Stage 1: Initial Consultation Personal Representative Meet with Attorney to revise/execute initial documents Stage 2: File Initial Documents with Probate Court Stage 3: Receive Letters of Administration Open Estate Checking and/or brokerage account from court Liquidate and consolidate estate assets as appropriate Stage 4: Publish Notice to Creditors File Inventory Obtain Apprasier for estate assets as appropriate 3 Month Creditor Period Pay Valid Dispute claims and File PR Proof of claim Stage 5: Creditor Period Expires Stage 5A - CPA Prepare and file tax returns as necessary Stage 6: Prepare Final Accounting obtain waivers Stage 7: Distribute Assets & Obtain Releases Distribute Estate Assets To beneficiaries Stage 8: Obtain Discharge of the Estate





