**MILLE LACS BAND COURT OF CENTRAL JURISDICTION**

**PROBATE CHECKLIST**

(Do not file with Court)

NOTE: This is not intended to be an exhaustive list of all the responsibilities of the Petitioner/Personal Representative. It is only for general guidance. Consult with an experienced probate attorney for additional assistance.

|  |  |
| --- | --- |
| ESTATE OF: | |
| DATE OF DEATH: | CASE NO. |
| TESTATE  INTESTATE | |
| PERSONAL REPRESENTATIVE(S): | |
| Name: | Name: |
| Address: | Address: |
|  |  |
| Phone: | Phone: |
| Email: | Email: |
| Fax: | Fax: |

|  | **Activity** | **Date Due** | **Date Done** |
| --- | --- | --- | --- |
| 1. | Obtain death certificate, locate Will and file |  |  |
| 2. | Determine who will act as Personal Representative(s) |  |  |
| 3. | Determine all interested parties, including names, addresses and SS #'s |  |  |
| 4. | Complete documents & file |  |  |
|  | □ Petition |  |  |
|  | □ Personal Representative’s Acceptance |  |  |
| 5. | Receive hearing date |  |  |
| 6. | Attend hearing & receive certified copies of Letters and Notice of Probate, Appointment of Personal Representative, & Notice to Creditors (“Notice”) |  |  |
| 7. | Mail Notice to decedent’s spouse, children, interested parties and known creditors & complete Certificate of Mailing |  |  |
| 8. | Have Notice published in paper |  |  |
| 9. | File Affidavit of Publication |  |  |
| 10. | Obtain list of all bills/debts and pay/disallow |  |  |
| 11. | Obtain legal descriptions of real estate and copies of leases |  |  |
| 12. | Safe deposit box opening |  |  |
| 13. | File Post Office Form 3575 to change mail address |  |  |
| 14. | Confirm insurance on all real/personal property |  |  |
| 15. | Identify employee retirement accounts or other benefits |  |  |
| 16. | Contact Minnesota Dept. of Commerce/Office of Unclaimed Property |  |  |
| 17. | Gather info re: outstanding debts and payments owed (contact the Mille Lacs Band Office of Management and Budget) |  |  |
| 18. | Last date for filing claims |  |  |
| 19. | Due date for Decedent's final income (Form 1040) tax returns. Retain □ Accountant □ Attorney for preparation assistance if needed. |  |  |
| 20. | Confirm payment of medical bills by insurance companies |  |  |
| 21. | Pay funeral and burial expenses |  |  |
| 22. | Apply for all refunds |  |  |
| 23. | Identify and confirm values/title on vehicles and other all assets |  |  |
| 24. | Prepare Inventory, file and serve residuary devisees |  |  |
| 25. | Pay real estate taxes (if any) |  |  |
| 26. | Pay creditors claims |  |  |
| 27. | Distribute estate assets and collect receipts from distributees |  |  |
| 28. | Prepare and file Statement of Distribution and Payment of Claims, send copies |  |  |
| 29. | Prepare and file Final Account |  |  |
| 30. | Prepare and file Personal Representative’s Statement to Close Estate |  |  |