

Williams Law Office, PC

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Thank you for trusting our office with your loved one's estate. It is our mission to make this process as simple as possible for you. We know that you do not handle estates every day, but we do, so we will do our best to guide you through the process most efficiently. This page gives you an outline of the steps in the probate process – this is very basic and additional steps may be necessary for your loved one's estate, so please stay in touch with us throughout the estate administration to be sure everything is on track.

Probate Process in a nutshell:

1. First meeting with Attorney and Personal Representative/family:
 - a. Gather information from Will, including Personal Representative's information and heirs names and addresses
2. Prepare Petition to Probate and attendant documents
 - a. Personal Representative will need to sign Oath and Petition to Probate
 - b. The Court will sign the appropriate Orders and return them to our office
 - c. Personal Representative receives Letters Testamentary showing the appointment
3. Notice of Administration to heirs – our office will mail these out
4. Publish in newspaper
 - a. Our office will make these arrangements
 - b. Any creditors who have claims against the estate will need to present those claims within 3 months of the publication in the newspaper
5. Obtain Tax ID
 - a. We will file for the Tax ID# for the estate
6. Set up a bank account for the estate using this tax ID#
7. Prepare inventory
 - a. Personal Representative will give our office a list of all of the estate assets and their value at the time of death
 - b. Our office will prepare the inventory and mail it to each of the heirs
 - c. We will prepare a notice to the Court showing that the inventory has been provided to the heirs, which will need to be signed by the Personal Representative
8. Pay claims and distribute assets
 - a. When all claims against the estate have been paid (and at least 3 months after the newspaper publication was made), the Personal Representative may begin distributing the assets of the estate
 - b. Consult with Lora before making any distributions
 - c. Keep very good records of all distributions made
 - d. Keep some money in the estate bank account to cover final expenses of wrapping up the estate
9. File Petition to Close after distributions have been made
 - a. Our office will prepare the Petition and the Personal Representative will need to sign it
 - b. The final attorney bill will be paid at this time
10. Three months after the Petition to Close is filed, the estate will be closed and the Personal Representative will be released from duty