

INFORMAL PROBATE

Do not copy
or file this page

2

Application for Appointment as Personal Representative

Part 2: The Appointment, Notice of Appointment,
Inventory and Appraisement
(Forms Packet)

SELF-SERVICE CENTER

**INFORMAL PROBATE
APPOINTMENT OF PERSONAL REPRESENTATIVE
AND ADMISSION OF WILL (if applicable)**

CHECKLIST

Use the forms and instructions in this packet only if the following factors apply to your situation:

- ✓ You have been appointed the Personal Representative of the estate of a person who died.
- ✓ You have signed the Acceptance of Appointment and are ready to give notice that you have been appointed.

READ ME: Consulting a lawyer before filing documents with the court may help prevent unexpected results. If you need to consult a Lawyer, the Pima County Bar Association offers a Lawyer Referral Service that provides half-hour consultations for a low cost.
<http://www.pimacountybar.org/>
The Clerk's office cannot provide legal advice. Employees may be able to offer instruction about how and where to file appropriate paperwork, but will not provide help on issues of law

SELF-SERVICE CENTER

INFORMAL PROBATE APPLICATION FOR APPOINTMENT AS PERSONAL REPRESENTATIVE

PART 2: The Appointment, Notice of Appointment, Inventory and Appraisement

This packet contains court forms and instructions to file informal probate application for appointment as personal representative. Items in **BOLD** are forms that you will need to file with the Court. Non-bold items are instructions or procedures. Do not copy or file those pages!

Order	File Number	Title	No. Pp.
1		Checklist for Appointment	1
2		Table of Contents (this page)	1
3		"Notice of Appointment"	2
4		"Proof of Mailing or Delivery of Notice of Appointment and/or Admission of Will to Probate and Order to Personal Representative"	1
5		"Notice to Creditors"	1
6		"Letter to Publisher About Creditors"	1
7		"Proof of Notice to Creditors"	1
8		"Inventory and Appraisement"	3

The documents you have received are copyrighted by the Superior Court of Arizona in Maricopa County. You have permission to use them for any lawful purpose. These forms shall not be used to engage in the unauthorized practice of law. The Court assumes no responsibility and accepts no liability for actions taken by users of these documents, including reliance on their contents. The documents are under continual revision and are current only for the day they were received. It is strongly recommended that you verify on a regular basis that you have the most current documents.

Person Filing: _____
Address (if not protected): _____
City, State, Zip Code: _____
Telephone: _____
Email Address: _____
Lawyer's Bar Number: _____
Licensed Fiduciary Number: _____



Representing Self, without a Lawyer or Attorney for Petitioner OR Respondent

SUPERIOR COURT OF ARIZONA IN PIMA COUNTY

In the Matter of the Estate of:

Case Number PB: _____

NOTICE OF:

_____ an Adult or a Minor, deceased

- INFORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE**
(Person died without a Will - "Intestate Estate"),
OR
- INFORMAL PROBATE OF A WILL AND INFORMAL APPOINTMENT OF A PERSONAL REPRESENTATIVE AND ADMISSION OF WILL** (Person died with a Will – "Testate Estate")

1. This Notice is being sent to those persons who have, or may have, some interest in the Estate of the person named in the court caption above, who died on _____ (date).

2. MY NAME AND ADDRESS:

My name is: _____

My address is: _____

3. **DOCUMENT FILED:** On _____ I filed the following document with the court:
(Month/Day/Year)

- Application for Informal Appointment of Personal Representative because the person died without a Will - "intestate estate," OR
- Application for Informal Probate of Will and For Informal Appointment of Personal Representative because the person died with a Will -- "testate estate"

Case No. _____

4. **APPOINTMENT AS PERSONAL REPRESENTATIVE.** On _____ (date) the Probate Registrar appointed _____ (name) as Personal Representative of the Estate of the person who died.
5. **BOND:** No bond is required or a bond in the amount of \$_____ is required which has been filed with the court.
6. **LOCATION OF PAPERS:** Papers relating to the Estate are on file with the Court at the address checked below, and are available for your inspection.
7. **COPY OF WILL. (Only if there is a Will)** A copy of the Will is attached to this notice for you. You have 4 months from the date you receive this Notice to begin a formal probate case.

DATED: _____
(Month/Day/Year)

Signature

Print Name

Person Filing: _____
 Address (if not protected): _____
 City, State, Zip Code: _____
 Telephone: _____
 Email Address: _____
 Lawyer's Bar Number: _____
 Licensed Fiduciary Number: _____

FOR CLERK'S USE ONLY

Representing Self, without a Lawyer or Attorney for Petitioner OR Respondent

SUPERIOR COURT OF ARIZONA PIMA COUNTY

In the Matter of the Estate of:

Case Number: _____

_____)
 an Adult or a Minor, deceased

PROOF OF DELIVERY OR MAIL OF:

- NOTICE INFORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE**
- ADMISSION OF WILL TO PROBATE**
- ORDER TO PERSONAL REPRESENTATIVE**

STATE OF ARIZONA)
 COUNTY OF PIMA) ss.

1. DOCUMENT: I delivered or mailed by first class mail, postage prepaid a copy of the following document:
 (Check one box)

- (If no Will exists)** NOTICE OF INFORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE and separate ORDER TO PERSONAL REPRESENTATIVE (Person died without a Will - "Intestate Estate"), OR
- (If a Will exists)** NOTICE OF ADMISSION OF A WILL AND INFORMAL APPOINTMENT OF A PERSONAL REPRESENTATIVE and separate ORDER TO PERSONAL REPRESENTATIVE (person died with a Will – "Testate Estate").

2. PERSONS. I mailed or delivered the document to the following persons entitled to notice of this case.
 (if you need more room, attach a sheet of paper):

NAME	ADDRESS	DATE MAILED OR DELIVERED
_____	_____	_____
_____	_____	_____
_____	_____	_____

Signature _____ Print Name _____

STATE OF _____

COUNTY OF _____

Subscribed and sworn to or affirmed before me this: _____ by _____
 (date)

(notary seal)

 Deputy Clerk or Notary Public

Person Filing: _____

Address (if not protected): _____

City, State, Zip Code: _____

Telephone: _____

Email Address: _____

Lawyer's Bar Number: _____

Licensed Fiduciary Number: _____

Representing Self, without a Lawyer or Attorney for Petitioner OR Respondent

FOR CLERK'S USE ONLY

SUPERIOR COURT OF ARIZONA IN PIMA COUNTY

In the Matter of the Estate of:

Case Number: _____

_____ an Adult or a Minor, deceased

NOTICE TO CREDITORS OF INFORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE AND/OR INFORMAL PROBATE OF A WILL (required by A.R.S. 14-3801)

NOTICE IS GIVEN THAT:

1. **PERSONAL REPRESENTATIVE:** (name) _____
has been appointed Personal Representative of this Estate on (date). _____
Address: _____

2. **DEADLINE TO MAKE CLAIMS.** All persons having claims against the Estate are required to present their claims **within four months** after the date of the first publication of this Notice or the claims will be forever barred.

3. **NOTICE OF CLAIMS:** Claims must be presented by delivering or mailing a written statement of the claim to the Personal Representative at (address) _____

4. **NOTICE OF APPOINTMENT.** A copy of the Notice of Appointment is attached to the copies of this document mailed to all known creditors.

DATED: _____

Personal Representative

Print Name

Print Name

Print Address

Month/Day/Year

Name of Newspaper

Address

RE: Case Number _____

To Whom It May Concern:

Enclosed is a court file-stamped copy of the Notice to Creditors in the above matter. In accordance with A.R.S. §14-3801, please publish this Notice in your newspaper once a week for three weeks in a row.

Enclosed is a check or money order in the amount of \$_____ for the cost of the publication.

Upon receipt of this letter, please call me at _____ to tell me when the first publication will occur. When all three weeks of publication have been leter completed, please file the original Affidavit of Publication with the Court and send me one copy.

Thank for your help in this matter.

Yours truly,

Sign Your Name

Enclose: Copy of Notice to Creditors
 Check or Money Order (call newspaper ahead of time to find out what the charge is)

FOR CLERK'S USE ONLY

Person Filing: _____
 Address (if not protected): _____
 City, State, Zip Code: _____
 Telephone: _____
 Email Address: _____
 Lawyer's Bar Number: _____
 Licensed Fiduciary Number: _____
 Representing Self, without a Lawyer or Attorney for Petitioner OR Respondent

FOR CLERK'S USE ONLY

SUPERIOR COURT OF ARIZONA IN PIMA COUNTY

In the Matter of the Estate of:

Case Number: PB _____

_____ an Adult or a Minor, deceased

PROOF OF DELIVERY OR MAILING OR PUBLISHING NOTICE TO CREDITORS OF INFORMAL APPOINTMENT OF PERSONAL REPRESENTATIVE AND/OR INFORMAL PROBATE OF A WILL

UNDER PENALTY OF PERJURY

1. **NOTICE.** I delivered or mailed by first class mail, postage prepaid a copy of the Notice to Creditors to the following known creditors entitled to such notice (if you need more room, attach a sheet of paper):

NAME	ADDRESS	DATE MAILED or DELIVERED
_____	_____	_____
_____	_____	_____
_____	_____	_____

2. **PUBLICATION.** The Notice to Creditors was published in the following newspaper on the following dates. The Affidavit of Publication is filed separately.

Name of newspaper: _____

Dates of publication: A. ____ / ____ / ____, B. ____ / ____ / ____, C. ____ / ____ / ____.

Signature _____ Print Name _____

STATE OF _____

COUNTY OF _____

Subscribed and sworn to or affirmed before me this: _____ by _____
(date)

(notary seal)

Deputy Clerk or Notary Public

Person Filing: _____
 Address (if not protected): _____
 City, State, Zip Code: _____
 Telephone: _____
 Email Address: _____
 Lawyer's Bar Number: _____
 Licensed Fiduciary Number: _____
 Representing Self, without a Lawyer or Attorney for Petitioner OR Respondent

FOR CLERK'S USE ONLY

SUPERIOR COURT OF ARIZONA IN PIMA COUNTY

In the Matter of:

Case Number: PB _____

_____ A Deceased Person

INVENTORY AND APPRAISEMENT AND PROOF OF MAILING

I am the Personal Representative for the decedent, the person who died, and I state under oath or affirm as follows:

1. **TRUE AND CORRECT STATEMENT.** The following inventory of property is a true and correct statement of all the property known to me to be owned by the person who died at his or her death.
2. **TOTAL ESTIMATED VALUE.** The total estimated value of all real and personal property in the estate, as supported by the following itemization of property, is \$_____.
3. **DESCRIPTION OF PROPERTY AND DEBT.** This document accurately describes each item of property, estimates the fair market value of the property as of the date of the decedent's death, describes the nature of the property as community or separate property, and itemizes the type and amount of all debts, mortgages, or liens relating to each item of property.
4. **NOTICE TO OTHER PARTIES.** A copy of this document was hand-delivered or mailed by first class mail, postage prepaid, to the following persons: (Attach additional paper if necessary.)

Name	Address	Relationship to Person who Died	Date Mailed or Delivered

_____ Date

_____ Signature

INVENTORY AND APPRAISEMENT OF PROPERTY IN ESTATE

(use additional sheets of paper if necessary)

Inventory date: _____

REAL PROPERTY

A. GENERAL INFORMATION:

Property Description and Address	Community OR Separate Property	Estimated Value in Dollars	Amount of Indebtedness in Dollars
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

Total estimated fair market value of real property: \$ _____

Total estimated debt on real property: \$ _____

B. THE FOLLOWING ITEMS LISTED ABOVE WERE PROFESSIONALLY APPRAISED:

Item Number Above	Appraiser's Name	Appraiser's Address

PERSONAL PROPERTY

A. GENERAL INFORMATION:

Property Description	Community OR Separate Property	Estimated Value in Dollars	Amount of Indebtedness in Dollars
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			

Total estimated fair market value of personal property: \$ _____

Total estimated debt on personal property: \$ _____

B. THE FOLLOWING ITEMS LISTED ABOVE WERE PROFESSIONALLY APPRAISED:

Item Number Above	Appraiser's Name	Appraiser's Address