

INFORMAL PROBATE

4

Closing the Estate as Personal Representative

(Forms Packet)

SELF-SERVICE CENTER

INFORMAL PROBATE CLOSING THE ESTATE OF THE PERSON WHO DIED

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; AND,
- ✓ The person had a will or did not have a will; AND,
- ✓ You have filed the final Accounting and Deed of Distribution; AND,
- ✓ You want to close the estate and close the court case: AND,
- ✓ At least 4 months have passed since you were appointed Personal Representative, and at least 4 months have passed since the date of the first publication to the Notice to Creditors.

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 PART 4: CLOSING THE ESTATE

This packet contains court forms and instructions to file informal probate. 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!

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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 MARICOPA COUNTY

In the Matter of the Estate of:

Case Number _____

(Name of the person who died)

CLOSING STATEMENT and PROOF OF MAILING/DELIVERY CLOSING STATEMENT

I am the Personal Representative of this Estate, and I make these statements under oath.

1. **Appointment as Personal Representative.** I was appointed as the Personal Representative of this Estate on _____ (date), more than four months before the date of this Closing Statement.
2. **Notice to Creditors.** The Notice to Creditors was published according to law. The first publication occurred on _____ (date), more than four months before the date of this Closing Statement.
3. **Administration of Estate.** The Estate has been fully administered by making payment, settlement or other disposition of all expenses of administration, and all taxes and claims that have accrued against the Estate with the following exceptions: (List the exceptions.)

4. **Distribution of Assets.** I have distributed all of the assets of the Estate to the persons entitled to distribution.
5. **Mailing Closing Statement.** I am sending a copy of this Closing Statement to all of the people to whom I distributed property of this Estate, to all people whose interests are affected by the administration of the Estate, and to all creditors or other claimants whose claims against the Estate are not barred or were not paid.
6. **Accounting.** I have mailed or delivered a copy of the full written accounting of the Estate to the people whose interests are affected by the administration of the Estate, including guardians ad litem, conservators and guardians.

7. Claims. With respect to any claim listed above in paragraph 3 that has not been paid and that is not barred, I have distributed the Estate subject to possible liability, with the agreement of the distributees, or the following arrangements have been made to accommodate outstanding liabilities: (List arrangements.)

Signature of Personal Representative

State of Arizona)
County of Pima)ss.

I, being duly sworn, state that I am the Personal Representative for the above Estate, and that the statements in the Closing Statement are accurate and complete to the best of my knowledge and belief. I also state that a copy of this closing statement was mailed to the following individuals on the date(s) and at the address(es) below.

Signature of Personal Representative

This Closing Statement was subscribed and sworn to before me this _____ day of _____, _____, by the above named person.

STATE OF _____

COUNTY OF _____

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

_____.

(notary seal)

Deputy Clerk or Notary Public

A copy of the Closing Statement was mailed to the following individuals (include additional pages as needed):

Name	Address	Date Mailed/Delivered
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____