

## DECEDENT'S ESTATE- FORMAL PROBATE

### SELF-HELP FORM PACKET



#### Attention

##### New Probate Court and In-Person Location:

Costa Mesa Justice Complex  
3390 Harbor Boulevard  
Costa Mesa, CA 92626



SHC-PB-14 (Rev. 11/28/2023)

Self-Help Services can review your completed forms before you file them with the Court. To request review of your completed forms:

1. Complete the attached forms in black ink.
2. Scan your completed forms and save as a single PDF file.
3. Go to [www.occourts.org/self-help](http://www.occourts.org/self-help) (scroll down and click the teal button labeled *Click Here to Contact Self-Help Services*), attach the PDF, and complete the online request form. Make sure to select PROBATE as the case type on the form.

# DECEDENT'S ESTATE

## FORMAL PROBATE

### COMMON WORDS

**Administrator:** The person (or entity) that the court appoints as a representative of the estate if there is no Will.

**Beneficiary:** A person who inherits when there is a Will and also inherits through intestate succession.

**Decedent:** The person who died.

**Decedent's Estate:** All real and personal property that a person owned at the time of death.

**Executor:** A person named in a Will and appointed by the court to carry out the decedent's wishes.

**Heir:** A person who inherits when there is no Will.

**Intestate:** When someone dies without leaving a Will.

**Intestate succession:** The order of who inherits property when someone dies without a Will.

**Petition:** A document requesting that the court make orders.

**Petitioner:** The person preparing and filing the Petition.

**Personal Representative:** The person appointed to manage the Estate.

### OVERVIEW

A **Decedent's Estate** refers to all property left behind when a person dies. This packet will cover how to obtain a court order through Formal Probate.

Formal Probate is one way someone can obtain legal permission to manage a **decedent's** property. It is commonly used when a decedent's estate value exceeds \$166,250.00. However, exceptions may exist depending on whether the decedent was survived by a spouse or registered domestic partner, or the type of assets in the estate. These exceptions may allow you to achieve the same result of Formal Probate, but through a more simplified process. It can be difficult to determine whether your case falls within one of these exceptions. If you are unsure if Formal Probate is right for you, please reach out to us before completing this packet.

Currently, Decedent's Estate hearing dates are typically scheduled 5-6 weeks out.

### PROCEDURE

#### Complete the Following Steps

- File the **Petition** (DE-111)
- A hearing will be set by the court
- Notice of Petition to Administer Estate (DE-121) is served, published in the attached Court approved newspaper list, and then filed with the attached Proof of Service
- Review any Probate Notes posted to the case (these are available 2-3 weeks before the hearing)
- Prepare for your hearing

#### Once a hearing is held:

- A **Personal Representative** is appointed
- Petitioner** submits Orders (DE-140) and Letters (DE-150) for Court approval

- Petitioner** files Duties and Liabilities of Personal Representative (DE-147) and (DE-147S)
- Petitioner** files Inventory and Appraisal (DE-160)
- Administrative duties are completed, including appraisals, payments made to creditors, and notifying government agencies
- Petitioner** files Final Accounting and Petition for Final Distribution and serves Notice of Hearing (DE-120) with attached Proof of Service
- Petitioner** distributes **Decedent's Estate**
- Case closes with granting of Ex Parte Petition for Final Discharge and Order (DE-295)

### **Document Review**

The Self-Help Probate Team offers a free optional document review service for self-represented litigants. As part of this service, an attorney or paralegal will review your documents for completion before filing. **Our staff cannot provide you with legal advice or strategy during this review.** To have your completed documents reviewed, please attach them to your contact request here: [www.occourts.org/self-help/](http://www.occourts.org/self-help/)

### **File Your Forms**

You may file your documents by choosing one of the following options:

- In Person:
  - Costa Mesa Justice Complex, 3390 Harbor Boulevard, Costa Mesa, CA 92626
- DropBox:
  - Costa Mesa Justice Complex, 3390 Harbor Boulevard, Costa Mesa, CA 92626
- Mail:
  - Costa Mesa Justice Complex, ATTN: Probate Clerk, 3390 Harbor Boulevard, Costa Mesa, CA 92626
- E-filing:
  - For additional information visit the court's public website:
    - <https://www.occourts.org/online-services/efiling/efiling-probate.html>

## ROADMAP



Forms



Document Review



File



Service



Prepare for the Hearing



Hearing

# Step 1:

# START YOUR CASE

---

Forms in **BOLD** are attached and can be clicked on to open and view electronically if you are reading this packet on an internet enabled device.

## REVIEW EACH STEP CAREFULLY

- Complete **DE-111- Petition for Probate.**
  - You will be assigned a case number, hearing date, time, and department.
  
- For the **DE-121- Notice of Petition to Administer Estate:**
  - Complete Pg. 1 and only the “Estate of” and “Case Number” boxes at the top of Pg. 2.
  - Probate hearings are held remotely. You are required to inform any parties served of this, so they don’t appear in person. The **Remote Hearing Attachment** included must be treated as part of DE-121.
  
- Complete **DE-142/DE-111- (A-3e) Waiver of Bond by Heir or Beneficiary.**
  - Do not use this form if a will exists and bond is waived in the will.
  - If a will exists and bond is not waived or no will exists, use this form if all persons eligible to receive a share of the estate waive the bond. Each person must sign their own form.
  
- When a waiver of bond is requested, complete **L-0758- Declaration in Support of Bond Waiver.**
  
- From the **Court Approved Newspaper List:**
  - Choose one newspaper where the decedent lived or owned property. List the newspaper you chose on DE-111, Pg. 1, Item 1.

ATTORNEY OR PARTY WITHOUT ATTORNEY: STATE BAR NO.: NAME: FIRM NAME: STREET ADDRESS: CITY: STATE: ZIP CODE: TELEPHONE NO.: FAX NO.: E-MAIL ADDRESS: ATTORNEY FOR (name):	<b>FOR COURT USE ONLY</b>		
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF</b> STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:			
ESTATE OF (name): <span style="float: right;">DECEDENT</span>			
<b>PETITION FOR</b> <input type="checkbox"/> <b>Probate of <input type="checkbox"/> Lost Will and for Letters Testamentary</b> <input type="checkbox"/> <b>Probate of <input type="checkbox"/> Lost Will and for Letters of Administration with Will Annexed</b> <input type="checkbox"/> <b>Letters of Administration</b> <input type="checkbox"/> <b>Letters of Special Administration <input type="checkbox"/> with general powers</b> <input type="checkbox"/> <b>Authorization to Administer Under the Independent Administration of Estates Act <input type="checkbox"/> with limited authority</b>	CASE NUMBER:  <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:70%;">HEARING DATE AND TIME:</td> <td style="width:30%;">DEPT.:</td> </tr> </table>	HEARING DATE AND TIME:	DEPT.:
HEARING DATE AND TIME:	DEPT.:		

1. Publication will be in (specify name of newspaper):

- a.  Publication requested.
- b.  Publication to be arranged.

2. **Petitioner** (name each):

**requests that**

- a.  decedent's will and codicils, if any, be admitted to probate.
- b. (name): be appointed
  - (1)  executor
  - (2)  administrator with will annexed
  - (3)  administrator
  - (4)  special administrator  with general powers and Letters issue upon qualification.
- c.  full  limited authority be granted to administer under the Independent Administration of Estates Act.
- d. (1)  bond not be required for the reasons stated in item 3e.  
 (2)  \$ bond be fixed. The bond will be furnished by an admitted surety insurer or as otherwise provided by law. (Specify reasons in Attachment 2 if the amount is different from the maximum required by Prob. Code, § 8482.)  
 (3)  \$ in deposits in a blocked account be allowed. Receipts will be filed. (Specify institution and location):

3. a. Decedent died on (date): at (place):

- (1)  a resident of the county named above.
- (2)  a nonresident of California and left an estate in the county named above located at (specify location permitting publication in the newspaper named in item 1):

b.  Decedent was a citizen of a country other than the United States (specify country):

c. Street address, city, and county of decedent's residence at time of death (specify):

ESTATE OF <i>(name)</i> :	CASE NUMBER:
DECEDENT	

3. d. **Character and estimated value of the property of the estate** *(complete in all cases)*:

- (1) Personal property: \$ \_\_\_\_\_
- (2) Annual gross income from
  - (a) real property: \$ \_\_\_\_\_
  - (b) personal property: \$ \_\_\_\_\_
- (3) **Subtotal** *(add (1) and (2))*: \$ \_\_\_\_\_
- (4) Gross fair market value of real property: \$ \_\_\_\_\_
- (5) (Less) Encumbrances: (\$ \_\_\_\_\_)
- (6) Net value of real property: \$ \_\_\_\_\_
- (7) **Total** *(add (3) and (6))*: \$ \_\_\_\_\_

- e. (1)  Will waives bond.  Special administrator is the named executor, and the will waives bond.
- (2)  All beneficiaries are adults and have waived bond, and the will does not require a bond. *(Affix waiver as Attachment 3e(2).)*
- (3)  All heirs at law are adults and have waived bond. *(Affix waiver as Attachment 3e(3).)*
- (4)  Sole personal representative is a corporate fiduciary or an exempt government agency.

- f. (1)  Decedent died intestate.
- (2)  Copy of decedent's will dated:  codicil dated *(specify for each)*:  
 are affixed as Attachment 3f(2). *(Include typed copies of handwritten documents and English translations of foreign-language documents.)*  
 The will and all codicils are self-proving (Prob. Code, § 8220).
- (3)  The original of the will and/or codicil identified above has been lost. *(Affix a copy of the lost will or codicil or a written statement of the testamentary words or their substance in Attachment 3f(3), and state reasons in that attachment why the presumption in Prob. Code, § 6124 does not apply.)*

g. **Appointment of personal representative** *(check all applicable boxes)*:

- (1) Appointment of executor or administrator with will annexed:
  - (a)  Proposed executor is named as executor in the will and consents to act.
  - (b)  No executor is named in the will.
  - (c)  Proposed personal representative is a nominee of a person entitled to Letters. *(Affix nomination as Attachment 3g(1)(c).)*
  - (d)  Other named executors will not act because of  death  declination  
 other reasons *(specify)*:

Continued in Attachment 3g(1)(d).

- (2) Appointment of administrator:
  - (a)  Petitioner is a person entitled to Letters. *(If necessary, explain priority in Attachment 3g(2)(a).)*
  - (b)  Petitioner is a nominee of a person entitled to Letters. *(Affix nomination as Attachment 3g(2)(b).)*
  - (c)  Petitioner is related to the decedent as *(specify)*:
- (3)  Appointment of special administrator requested. *(Specify grounds and requested powers in Attachment 3g(3).)*
- (4)  Proposed personal representative would be a successor personal representative.

h. Proposed personal representative is a

- (1)  resident of California.
- (2)  nonresident of California *(specify permanent address)*:
- (3)  resident of the United States.
- (4)  nonresident of the United States.

ESTATE OF (name):

CASE NUMBER:

DECEDENT

4.  Decedent's will does not preclude administration of this estate under the Independent Administration of Estates Act.
5. a. Decedent was survived by (check items (1) or (2), and (3) or (4), and (5) or (6), and (7) or (8))
- (1)  spouse.
- (2)  no spouse as follows:
- (a)  divorced or never married.
- (b)  spouse deceased.
- (3)  registered domestic partner.
- (4)  no registered domestic partner. (See Fam. Code, § 297.5(c); Prob. Code, §§ 37(b), 6401(c), and 6402.)
- (5)  child as follows:
- (a)  natural or adopted.
- (b)  natural adopted by a third party.
- (6)  no child.
- (7)  issue of a predeceased child.
- (8)  no issue of a predeceased child.
- b. Decedent  was  was not survived by a stepchild or foster child or children who would have been adopted by decedent but for a legal barrier. (See Prob. Code, § 6454.)
6. (Complete if decedent was survived by (1) a spouse or registered domestic partner but no issue (only a or b apply), or (2) no spouse, registered domestic partner, or issue. (Check the **first** box that applies):
- a.  Decedent was survived by a parent or parents who are listed in item 8.
- b.  Decedent was survived by issue of deceased parents, all of whom are listed in item 8.
- c.  Decedent was survived by a grandparent or grandparents who are listed in item 8.
- d.  Decedent was survived by issue of grandparents, all of whom are listed in item 8.
- e.  Decedent was survived by issue of a predeceased spouse, all of whom are listed in item 8.
- f.  Decedent was survived by next of kin, all of whom are listed in item 8.
- g.  Decedent was survived by parents of a predeceased spouse or issue of those parents, if both are predeceased, all of whom are listed in item 8.
- h.  Decedent was survived by no known next of kin.
7. (Complete only if no spouse or issue survived decedent.)
- a.  Decedent had no predeceased spouse.
- b.  Decedent had a predeceased spouse who
- (1)  died not more than 15 years before decedent and who owned an interest in **real property** that passed to decedent,
- (2)  died not more than five years before decedent and who owned **personal property** valued at \$10,000 or more that passed to decedent, (If you checked (1) or (2), check only the **first** box that applies):
- (a)  Decedent was survived by issue of a predeceased spouse, all of whom are listed in item 8.
- (b)  Decedent was survived by a parent or parents of the predeceased spouse who are listed in item 8.
- (c)  Decedent was survived by issue of a parent of the predeceased spouse, all of whom are listed in item 8.
- (d)  Decedent was survived by next of kin of the decedent, all of whom are listed in item 8.
- (e)  Decedent was survived by next of kin of the predeceased spouse, all of whom are listed in item 8.
- (3)  neither (1) nor (2) apply.
8. Listed on the next page are the names, relationships to decedent, ages, and addresses, so far as known to or reasonably ascertainable by petitioner, of (1) all persons mentioned in decedent's will or any codicil, whether living or deceased; (2) all persons named or checked in items 2, 5, 6, and 7; and (3) all beneficiaries of a trust named in decedent's will or any codicil in which the trustee and personal representative are the same person.

ESTATE OF <i>(name)</i> :	CASE NUMBER:
DECEDENT	

8.      Name and relationship to decedent                      Age                                      Address

Continued on Attachment 8.

9. Number of pages attached: \_\_\_\_\_

Date:

\_\_\_\_\_  
(TYPE OR PRINT NAME OF ATTORNEY)

▶ \_\_\_\_\_  
(SIGNATURE OF ATTORNEY) \*

\* (Signatures of all petitioners are also required. All petitioners must sign, but the petition may be verified by any one of them (Prob. Code, §§ 1020, 1021; Cal. Rules of Court, rule 7.103).)

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

\_\_\_\_\_  
(TYPE OR PRINT NAME OF PETITIONER)

▶ \_\_\_\_\_  
(SIGNATURE OF PETITIONER)

\_\_\_\_\_  
(TYPE OR PRINT NAME OF PETITIONER)

▶ \_\_\_\_\_  
(SIGNATURE OF PETITIONER)

Signatures of additional petitioners follow last attachment.



ATTORNEY OR PARTY WITHOUT ATTORNEY <i>(Name, State Bar number, and address):</i>  TELEPHONE NO.: _____ FAX NO. <i>(Optional):</i> _____ E-MAIL ADDRESS <i>(Optional):</i> _____ ATTORNEY FOR <i>(Name):</i> _____	<b>FOR COURT USE ONLY</b>
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF</b> STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:	
ESTATE OF <i>(Name):</i> _____	
DECEDENT	
<b>NOTICE OF PETITION TO ADMINISTER ESTATE OF</b> <b><i>(Name):</i></b>	CASE NUMBER:

1. To all heirs, beneficiaries, creditors, contingent creditors, and persons who may otherwise be interested in the will or estate, or both, of *(specify all names by which the decedent was known):*
  
2. A **Petition for Probate** has been filed by *(name of petitioner):*  
in the Superior Court of California, County of *(specify):*
  
3. The Petition for Probate requests that *(name):*  
be appointed as personal representative to administer the estate of the decedent.
  
4.  The petition requests the decedent's will and codicils, if any, be admitted to probate. The will and any codicils are available for examination in the file kept by the court.
  
5.  The petition requests authority to administer the estate under the Independent Administration of Estates Act. (This authority will allow the personal representative to take many actions without obtaining court approval. Before taking certain very important actions, however, the personal representative will be required to give notice to interested persons unless they have waived notice or consented to the proposed action.) The independent administration authority will be granted unless an interested person files an objection to the petition and shows good cause why the court should not grant the authority.
  
6. **A hearing on the petition will be held in this court as follows:**

a. Date:	Time:	Dept.:	Room:
----------	-------	--------	-------

  
 b. Address of court:  same as noted above       other *(specify):*
  
7. **If you object** to the granting of the petition, you should appear at the hearing and state your objections or file written objections with the court before the hearing. Your appearance may be in person or by your attorney.
  
8. **If you are a creditor or a contingent creditor of the decedent**, you must file your claim with the court and mail a copy to the personal representative appointed by the court within the **later** of either (1) **four months** from the date of first issuance of letters to a general personal representative, as defined in section 58(b) of the California Probate Code, or (2) **60 days** from the date of mailing or personal delivery to you of a notice under section 9052 of the California Probate Code.  
**Other California statutes and legal authority may affect your rights as a creditor. You may want to consult with an attorney knowledgeable in California law.**
  
9. **You may examine the file kept by the court.** If you are a person interested in the estate, you may file with the court a *Request for Special Notice* (form DE-154) of the filing of an inventory and appraisal of estate assets or of any petition or account as provided in Probate Code section 1250. A *Request for Special Notice* form is available from the court clerk.
  
10.  Petitioner     Attorney for petitioner *(name):*  
*(Address):*  
  
*(Telephone):*

**NOTE:** If this notice is published, print the caption, beginning with the words NOTICE OF PETITION TO ADMINISTER ESTATE, and do not print the information from the form above the caption. The caption and the decedent's name must be printed in at least 8-point type and the text in at least 7-point type. Print the case number as part of the caption. Print items preceded by a box only if the box is checked. Do not print the italicized instructions in parentheses, the paragraph numbers, the mailing information, or the material on page 2.

ESTATE OF <i>(Name)</i> :	CASE NUMBER:
DECEDENT	

**PROOF OF SERVICE BY MAIL**

1. I am over the age of 18 and not a party to this cause. I am a resident of or employed in the county where the mailing occurred.
2. My residence or business address is *(specify)*:
  
3. I served the foregoing *Notice of Petition to Administer Estate* on each person named below by enclosing a copy in an envelope addressed as shown below **AND**
  - a.  **depositing** the sealed envelope with the United States Postal Service on the date and at the place shown in item 4, with the postage fully prepaid.
  - b.  **placing** the envelope for collection and mailing on the date and at the place shown in item 4 following our ordinary business practices. I am readily familiar with this business's practice for collecting and processing correspondence for mailing. On the same day that correspondence is placed for collection and mailing, it is deposited in the ordinary course of business with the United States Postal Service, in a sealed envelope with postage fully prepaid.
4. a. Date mailed: \_\_\_\_\_ b. Place mailed *(city, state)*: \_\_\_\_\_
5.  I served, with the *Notice of Petition to Administer Estate*, a copy of the petition or other document referred to in the notice.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: \_\_\_\_\_

(TYPE OR PRINT NAME OF PERSON COMPLETING THIS FORM)	 (SIGNATURE OF PERSON COMPLETING THIS FORM)
---	--

**NAME AND ADDRESS OF EACH PERSON TO WHOM NOTICE WAS MAILED**

	<u>Name of person served</u>	<u>Address (number, street, city, state, and zip code)</u>
1.		
2.		
3.		
4.		
5.		
6.		

Continued on an attachment. *(You may use form DE-121(MA) to show additional persons served.)*

Assistive listening systems, computer-assisted real-time captioning, or sign language interpreter services are available upon request if at least 5 days notice is provided. Contact the clerk's office for *Request for Accommodations by Persons With Disabilities and Order* (form MC-410). (Civil Code section 54.8.)



SHORT TITLE:  	CASE NUMBER:  
----------------------	----------------------

**ATTACHMENT** (Number): \_\_\_\_\_

*(This Attachment may be used with any Judicial Council form.)*

*(If the item that this Attachment concerns is made under penalty of perjury, all statements in this Attachment are made under penalty of perjury.)*

Page \_\_\_\_\_ of \_\_\_\_\_

*(Add pages as required)*



ATTORNEY OR PARTY WITHOUT ATTORNEY: STATE BAR NO.: NAME: FIRM NAME: STREET ADDRESS: CITY: STATE: ZIP CODE: TELEPHONE NO.: FAX NO.: E-MAIL ADDRESS: ATTORNEY FOR (name):	<b>FOR COURT USE ONLY</b>
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF</b> STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:	
ESTATE OF (Name): _____, DECEDENT	
<b>WAIVER OF BOND BY HEIR OR BENEFICIARY</b> <input type="checkbox"/> Attachment 3e to Petition for Probate*	CASE NUMBER: _____

**NOTICE: READ PARAGRAPHS A–G BEFORE YOU SIGN**

- A. A bond is a form of insurance to replace assets that may be mismanaged or stolen by the executor or administrator (the estate's **personal representative**). The cost of the bond is paid from the assets of the estate.
- B. A bond may not be required if the decedent's will admitted to probate waives a bond and the court approves.
- C. If the decedent's will does not waive bond, or if the decedent died without a will, the law ordinarily requires the personal representative to give a bond approved and ordered by the court. However, all persons eligible to receive a share of the estate may waive the requirement of a bond. If they all waive bond and the court approves, the personal representative will NOT have to give a bond.
- D. **If bond is not ordered by the court, and the estate suffers loss because the personal representative fails to properly perform the duties of the office, the loss or some part of it may not be recoverable from the personal representative. If so, your share of the estate may be partly or entirely lost.**
- E. You may waive the requirement of a bond by signing this form and delivering it to the petitioner for appointment of a personal representative or to the petitioner's attorney. Your waiver cannot be withdrawn after the court appoints the personal representative without requiring a bond. However, if you sign a waiver of bond, you may later petition the court to require a bond.
- F. A guardian ad litem or other legal representative with specific authority under law to waive bond must sign for a minor, an incapacitated person, an unascertained beneficiary, or a designated class of persons who are not ascertained or not yet in being. See Judicial Council forms DE-350 and DE-351 and Probate Code section 1003.
- G. **If you do not understand this form, do not sign it until you have asked a lawyer (who is independent of the lawyer for the proposed personal representative) to explain it to you.**

**WAIVER**

- 1. I have read and understand paragraphs A through G above.
- 2. I understand that before signing this form, I am free to consult with a lawyer of my choice concerning the possible consequences to me of waiving bond.
- 3. I understand that I do not have to waive bond to allow the estate administration to begin or proceed, or to receive my share of the estate.
- 4. I WAIVE the posting of bond in this estate by (name of personal representative): \_\_\_\_\_

Date: \_\_\_\_\_

(TYPE OR PRINT NAME OF BENEFICIARY (AND AUTHORIZED SIGNER, IF BENEFICIARY IS NOT AN INDIVIDUAL))	(SIGNATURE)
--	-------------

**\*(This form may be filed as an independent form (as form DE-142) OR as Attachment 3e(2) (will) or Attachment 3e(3) (intestacy) to the Petition for Probate (form DE-111) (as form DE-111(A-3e).)**



IN THE MATTER OF:	CASE NUMBER:
-------------------	--------------

3. The estate is expected to be:  solvent  insolvent

4. The efforts taken to obtain the above information were as follows:

- Reviewed decedent's mail for \_\_\_\_\_ days
- Reviewed current utility bills
- Reviewed current property tax bills
- Reviewed bank statements for the last \_\_\_\_\_ months
- Reviewed most recent income tax returns
- Other: \_\_\_\_\_

I/We declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

\_\_\_\_\_

(DATE)

\_\_\_\_\_

(TYPE OR PRINT NAME)

\_\_\_\_\_

(SIGNATURE OF PETITIONER)

\_\_\_\_\_

(TYPE OR PRINT NAME)

\_\_\_\_\_

(SIGNATURE OR PETITIONER)



**SUPERIOR COURT OF CALIFORNIA  
COUNTY OF ORANGE**

[WWW.OCCOURTS.ORG](http://WWW.OCCOURTS.ORG)

**NEWSPAPERS OF GENERAL CIRCULATION (ADJUDICATED)**

Pursuant to Section 6000-6027 of the Government Code, the Superior Court of California, County of Orange, has ruled that the following publications are newspapers of general circulation.<sup>1</sup>

<i>Name of Publication</i>	<i>Address</i>	<i>Telephone Number</i>	<i>Date Ordered</i>
*ANAHEIM BULLETIN	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	12/28/1951
ANAHEIM PRESS	121 E. Chestnut Avenue, Monrovia, CA 91016	626-301-1010 <a href="mailto:legals@hlrmedia.com">legals@hlrmedia.com</a>	12/13/2017
BUENA PARK/ANAHEIM INDEPENDENT	5119 Ball Road Cypress, CA 90630	714-952-8505 <a href="mailto:info@localnewspapers.org">info@localnewspapers.org</a>	10/18/1996
*CAPISTRANO VALLEY NEWS	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	06/07/1984
COTO DE CAZA NEWS	23472 Vista del Verde, Suite 6 Coto de Caza, CA 92679	949-589-9990 <a href="mailto:mvlegals@yahoo.com">mvlegals@yahoo.com</a>	08/29/1995
*CURRENT	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	06/06/2003
**DAILY PILOT	N/A	888-881-6181 <a href="mailto:lalegal@tribune.com">lalegal@tribune.com</a>	09/26/1961
*DANA POINT NEWS	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	02/19/1998
DANA POINT TIMES	34932 Calle Del Sol, Suite B Capistrano Beach, CA 92624	949-388-7700 X100 <a href="mailto:Legals@picketfencemedia.com">Legals@picketfencemedia.com</a>	08/23/2018
EVENT NEWSPAPERS	5119 Ball Road Cypress, CA 90630	714-220-0292 <a href="mailto:info@localnewspapers.org">info@localnewspapers.org</a>	06/23/2000
*FOUNTAIN VALLEY VIEW	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	07/01/1998
*FULLERTON NEWS TRIBUNE	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	02/09/1952

<sup>1</sup>The newspapers shall remain on this list until court's ruling is vacated, modified, or set aside pursuant to GC 6024





**SUPERIOR COURT OF CALIFORNIA  
COUNTY OF ORANGE**

[WWW.OCCOURTS.ORG](http://www.occourts.org)

**NEWSPAPERS OF GENERAL CIRCULATION (ADJUDICATED)**

Pursuant to Section 6000-6027 of the Government Code, the Superior Court of California, County of Orange, has ruled that the following publications are newspapers of general circulation.<sup>1</sup>

<i>Name of Publication</i>	<i>Address</i>	<i>Telephone Number</i>	<i>Date Ordered</i>
**HUNTINGTON BEACH INDEPENDENT (Zoned area of Daily Pilot)	N/A	888-881-6181 <a href="mailto:lalegal@tribune.com">lalegal@tribune.com</a>	08/26/1994
*HUNTINGTON BEACH WAVE	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	07/01/1998
HUNTINGTON HARBOUR SUN JOURNAL	216 Main Street Seal Beach, CA 90740	562-430-7555	07/26/1991
HUNTINGTON VOICE Attn: Dee PFanstiel	3010 E. Anaheim Street Long Beach, CA 90804	562-438-5641	09/12/2007
INDEPENDENT	5119 Ball Road Cypress, CA 90630	714-220-0292 <a href="mailto:info@localnewspapers.org">info@localnewspapers.org</a>	12/05/2003
IRVINE ORACLE Attn: Dee PFanstiel	3010 E. Anaheim Street Long Beach, CA 90804	562-438-5641	02/08/2007
*IRVINE WORLD NEWS	2190 S. Towne Center Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	08/23/1990
LADERA RANCH NEWS	23472 Vista Del Verde, #6 Coto de Caza, CA 92679	949-589-9990 <a href="mailto:mvlegals@yahoo.com">mvlegals@yahoo.com</a>	12/30/2004
**LAGUNA BEACH COAST LINE PILOT (Zoned area of Daily Pilot)	N/A	888-881-6181 <a href="mailto:lalegal@tribune.com">lalegal@tribune.com</a>	07/27/1992
*LAGUNA NEWS POST	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	09/28/1967
*LAGUNA NIGUEL NEWS	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	02/19/1998

<sup>1</sup>The newspapers shall remain on this list until court's ruling is vacated, modified, or set aside pursuant to GC 6024



**SUPERIOR COURT OF CALIFORNIA  
COUNTY OF ORANGE**

[WWW.OCCOURTS.ORG](http://WWW.OCCOURTS.ORG)

**NEWSPAPERS OF GENERAL CIRCULATION (ADJUDICATED)**

Pursuant to Section 6000-6027 of the Government Code, the Superior Court of California, County of Orange, has ruled that the following publications are newspapers of general circulation.<sup>1</sup>

<i>Name of Publication</i>	<i>Address</i>	<i>Telephone Number</i>	<i>Date Ordered</i>
*LAGUNA WOODS GLOBE	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	05/01/2006
MISSION VIEJO NEWS	23472 Vista del Verde, Suite 6 Coto de Caza, CA 92679	949-589-2333 <a href="mailto:mvlegals@yahoo.com">mvlegals@yahoo.com</a>	07/06/2000
NEWPORT NEWS	23472 Vista Del Verde, Suite 6 Coto De Caza, CA 92679	949-589-9990 <a href="mailto:mvlegals@yahoo.com">mvlegals@yahoo.com</a>	07/15/1997
NEWS ENTERPRISE	7441 Garden Grove Blvd., Suite G Garden Grove, CA 92841	714-894-2575 <a href="mailto:info@localnewspapers.org">info@localnewspapers.org</a>	02/08/1994
NGUOI VIET DAILY NEWS, INC.	14771 Moran Street Westminster, CA 92683	714-892-9414	06/06/2011
*ORANGE CITY NEWS	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	08/17/1970
ORANGE COUNTY BUSINESS JOURNAL	18500 Von Karman Avenue, Suite 150 Irvine, CA 92612	949-833-8373	04/24/1990
ORANGE COUNTY NEWS	7441 Garden Grove Blvd., Suite G Garden Grove, CA 92841	714-894-2575 <a href="mailto:info@localnewspapers.org">info@localnewspapers.org</a>	01/31/1978
*ORANGE COUNTY REGISTER	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:scampos@scng.com">scampos@scng.com</a>	01/18/1952
ORANGE COUNTY REPORTER	600 W. Santa Ana Blvd., #205 Santa Ana, CA 92701	714-543-2027	06/02/1922
ORANGE VOICE Attn: Dee PFanstiel	3010 E. Anaheim Street Long Beach, CA 90804	562-438-5641	09/17/2007

<sup>1</sup>The newspapers shall remain on this list until court's ruling is vacated, modified, or set aside pursuant to GC 6024



**SUPERIOR COURT OF CALIFORNIA  
COUNTY OF ORANGE**

[WWW.OCCOURTS.ORG](http://WWW.OCCOURTS.ORG)

**NEWSPAPERS OF GENERAL CIRCULATION (ADJUDICATED)**

Pursuant to Section 6000-6027 of the Government Code, the Superior Court of California, County of Orange, has ruled that the following publications are newspapers of general circulation.<sup>1</sup>

<i>Name of Publication</i>	<i>Address</i>	<i>Telephone Number</i>	<i>Date Ordered</i>
*PLACENTIA NEWS TIMES	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	10/26/1982
*SADDLEBACK VALLEY NEWS	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	08/02/1988
SAN CLEMENTE NEWS	23472 Vista Del Verde, #6 Coto de Caza, CA 92679	949-589-9990 <a href="mailto:mvlegals@yahoo.com">mvlegals@yahoo.com</a>	03/21/2006
SAN CLEMENTE TIMES	34932 Calle Del Sol, Suite B Capistrano Beach, CA 92624	949-388-7700 X100 <a href="mailto:Legals@picketfencemedia.com">Legals@picketfencemedia.com</a>	08/23/2018
SANTA ANA VOICE Attn: Dee Pfanstiel	3010 E. Anaheim Street Long Beach, CA 90804	562-438-5641	09/17/2007
SEAL BEACH SUN	216 Main Street Seal Beach, CA 90740	562-430-7555	02/24/1975
*STAR PROGRESS	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	06/15/2001
*SUN POST NEWS	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	06/20/1994
*TUSTIN NEWS	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	08/24/1928
WESTMINSTER HERALD	5789 Westminster Blvd. Westminster, CA 92683	714-893-4501 <a href="mailto:info@localnewspapers.org">info@localnewspapers.org</a>	01/31/1964
WESTMINSTER JOURNAL	7441 Garden Grove, Suite G Garden Grove, CA 92841	714-895-3484 <a href="mailto:info@localnewspapers.org">info@localnewspapers.org</a>	11/12/1980

<sup>1</sup>The newspapers shall remain on this list until court's ruling is vacated, modified, or set aside pursuant to GC 6024  
Revised 07/2020  
L-1116



**SUPERIOR COURT OF CALIFORNIA  
COUNTY OF ORANGE**

[WWW.OCCOURTS.ORG](http://WWW.OCCOURTS.ORG)

**NEWSPAPERS OF GENERAL CIRCULATION (ADJUDICATED)**

Pursuant to Section 6000-6027 of the Government Code, the Superior Court of California, County of Orange, has ruled that the following publications are newspapers of general circulation.<sup>1</sup>

<i>Name of Publication</i>	<i>Address</i>	<i>Telephone Number</i>	<i>Date Ordered</i>
*YORBA LINDA STAR	2190 S. Towne Centre Place, Suite 100 Anaheim, CA 92806	714-796-2209 <a href="mailto:cgonzales@scng.com">cgonzales@scng.com</a>	05/07/1952
YORBA LINDA VOICE Attn: Dee PFanstiel	3010 E. Anaheim Street Long Beach, CA 90804	562-438-5641	09/12/2007

\*Orange County Register

\*\*Los Angeles Times

<sup>1</sup>The newspapers shall remain on this list until court's ruling is vacated, modified, or set aside pursuant to GC 6024

# Step 2:

# PREPARE FOR YOUR HEARING

---

Forms in **BOLD** are attached and can be clicked on to open and view electronically if you are reading this packet on an internet enabled device.

## REVIEW EACH STEP CAREFULLY

- Filed DE-111- Petition for Probate
  - Make copies to serve each person listed on DE-111, Pg. 7, Item 8.
- On your **DE-121- Notice of Petition to Administer Estate**:
  - Complete Item 6a. This will be your original.
  - Make the same number of copies you made of DE-111 and one for the newspaper you chose for publication.
  - Submit one copy to the newspaper.
  - An adult, not involved in the case, must mail one copy of DE-111 and DE-121 to each person listed on DE-111, Pg. 7, Item 8.
  - The adult that helped you must complete Pg. 2 of your original DE-121.
    - If more than 6 people need to be served, use **Form DE-121 (MA)**.
- Probate Notes
  - Monitor your Probate Notes.
  - If you need help clearing them, sign up for the **Clearing Your Probate Notes Workshop**.
- File your original DE-121
  - Include Pg. 1, Pg. 2, Remote Hearing Attachment, and if necessary, DE-121 (MA).
- Ensure the newspaper files proof of publication.



# SUPERIOR COURT OF CALIFORNIA, COUNTY OF ORANGE

## SELF-HELP SERVICES

### CLEARING YOUR PROBATE NOTES WORKSHOP

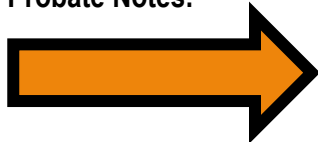
#### About Us:

**Self-Help Services** can help self-represented litigants correct Probate Notes in their case.

#### Benefits:

- Learn what Probate Notes are.
- Learn how to find your Probate Notes online.
- Learn how to correct your Probate Notes.
- Ask questions about your Probate Notes.
- Work on clearing your Probate Notes with staff.
- Plan for the next steps in your case.
- Avoid delays and to move your case forward.

Scan this QR Code  
to learn more about  
Probate Notes.



#### When?

- ☐ Mondays
- 🕒 9:00am – 11:00am



#### Where? You Choose:

- 📺 Remote or 🚶 In-Person:
- Costa Mesa Justice Complex  
3390 Harbor Boulevard, #220  
Costa Mesa, CA 92626



#### Do I Need to Register?

- Yes, you must register.
- We are unable to assist Walk-Ins.



#### How Do I Register?

- 📞 Call: (657) 622-7170 or
- 📺 Online:
- ① Visit: [www.occourts.org/self-help](http://www.occourts.org/self-help)
- ② Click "Contact Self-Help Services"
- ③ Complete the request form:
  - Ask to register for the workshop
  - Select PROBATE case-type

■ Contact Us: Self-Help Services ■ 📞 Phone (657) 622-7170 ■ 🌐 Website: [www.occourts.org/self-help](http://www.occourts.org/self-help) ■



# Step 3: AFTER YOUR HEARING

Forms in **BOLD** are attached and can be clicked on to open and view electronically if you are reading this packet on an internet enabled device.

## REVIEW EACH STEP CAREFULLY

- Wait for the Minute Order of your hearing to be filed. A Minute Order is an overview of what happened at your hearing prepared by the Court.
  - You can check on its status by visiting the “Register of Actions” section here:
    - <https://www.bccourts.cfl/online-services/case-access>
- Complete **DE-140- Order**.
- Complete **DE-150- Letters**.
- Complete **DE-147- Duties and Liabilities of Personal Representative**.
- Complete **DE-147S- Confidential Statement of Birth Date and Driver’s License Number**.
- Complete **L-1450- Agreement to Appear**.
- File DE-140, DE-150, DE-147, DE-147S, and L-1450.
- Wait for the Court to process and sign DE-140 and DE-150.
  - You can check on their status by visiting the “Register of Actions” Section here:
    - § <https://www.bccourts.cfl/online-services/case-access>
    - § Look for both to be listed as “FILED” not only “RECEIVED.”
- Once “FILED” you must request Certified Copies before moving to Step 4: Gather Assets.





ATTORNEY OR PARTY WITHOUT ATTORNEY ( <i>Name, state bar number, and address</i> ):	TELEPHONE AND FAX NOS.:	<b>FOR COURT USE ONLY</b>
ATTORNEY FOR ( <i>Name</i> ):		
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF</b>		
STREET ADDRESS:		
MAILING ADDRESS:		
CITY AND ZIP CODE:		
BRANCH NAME:		
ESTATE OF ( <i>Name</i> ):		
<b>LETTERS</b>		DECEDENT
<input type="checkbox"/> <b>TESTAMENTARY</b>	<input type="checkbox"/> <b>OF ADMINISTRATION</b>	CASE NUMBER:
<input type="checkbox"/> <b>OF ADMINISTRATION WITH WILL ANNEXED</b>	<input type="checkbox"/> <b>SPECIAL ADMINISTRATION</b>	

**LETTERS**

1.  The last will of the decedent named above having been proved, the court appoints (*name*):
  - a.  executor.
  - b.  administrator with will annexed.
  
2.  The court appoints (*name*):
  - a.  administrator of the decedent's estate.
  - b.  special administrator of decedent's estate
    - (1)  with the special powers specified in the *Order for Probate*.
    - (2)  with the powers of a general administrator.
    - (3)  letters will expire on (*date*):
  
3.  The personal representative is authorized to administer the estate under the Independent Administration of Estates Act  **with full authority**  **with limited authority** (no authority, without court supervision, to (1) sell or exchange real property or (2) grant an option to purchase real property or (3) borrow money with the loan secured by an encumbrance upon real property).
  
4.  The personal representative is not authorized to take possession of money or any other property without a specific court order.

**AFFIRMATION**

1.  PUBLIC ADMINISTRATOR: No affirmation required (Prob. Code, § 7621(c)).
  
2.  INDIVIDUAL: **I solemnly affirm** that I will perform the duties of personal representative according to law.
  
3.  INSTITUTIONAL FIDUCIARY (*name*):
 

**I solemnly affirm** that the institution will perform the duties of personal representative according to law. I make this affirmation for myself as an individual and on behalf of the institution as an officer. (*Name and title*):
  
4. Executed on (*date*): \_\_\_\_\_  
at (*place*): \_\_\_\_\_, California.



(SIGNATURE)

**CERTIFICATION**

I certify that this document is a correct copy of the original on file in my office and the letters issued the personal representative appointed above have not been revoked, annulled, or set aside, and are still in full force and effect.

WITNESS, clerk of the court, with seal of the court affixed.

(SEAL)

Date: \_\_\_\_\_

Clerk, by \_\_\_\_\_

(DEPUTY)

(SEAL)

Date: \_\_\_\_\_

Clerk, by \_\_\_\_\_

(DEPUTY)



ESTATE OF (Name):

CASE NUMBER:

DECEDENT

**d. File a change of ownership**

At the time you file the inventory and appraisal, you must also file a change of ownership statement with the county recorder or assessor in each county where the decedent owned real property at the time of death, as provided in section 480 of the California Revenue and Taxation Code.

**3. NOTICE TO CREDITORS**

You must mail a notice of administration to each known creditor of the decedent within four months after your appointment as personal representative. If the decedent received Medi-Cal assistance, you must notify the State Director of Health Services within 90 days after appointment.

**4. INSURANCE**

You should determine that there is appropriate and adequate insurance covering the assets and risks of the estate. Maintain the insurance in force during the entire period of the administration.

**5. RECORD KEEPING**

**a. Keep accounts**

You must keep complete and accurate records of each financial transaction affecting the estate. You will have to prepare an account of all money and property you have received, what you have spent, and the date of each transaction. You must describe in detail what you have left after the payment of expenses.

**b. Court review**

Your account will be reviewed by the court. Save your receipts because the court may ask to review them. If you do not file your accounts as required, the court will order you to do so. You may be removed as personal representative if you fail to comply.

**6. CONSULTING AN ATTORNEY**

If you have an attorney, you should cooperate with the attorney at all times. You and your attorney are responsible for completing the estate administration as promptly as possible. **When in doubt, contact your attorney.**

**NOTICE: 1. This statement of duties and liabilities is a summary and is not a complete statement of the law. Your conduct as a personal representative is governed by the law itself and not by this summary.**  
**2. If you fail to perform your duties or to meet the deadlines, the court may reduce your compensation, remove you from office, and impose other sanctions.**

**ACKNOWLEDGMENT OF RECEIPT**

- 1. I have petitioned the court to be appointed as a personal representative.
- 2. My address and telephone number are (*specify*):
  
- 3. I acknowledge that I have received a copy of this statement of the duties and liabilities of the office of personal representative.

Date: \_\_\_\_\_

\_\_\_\_\_  
(TYPE OR PRINT NAME)



\_\_\_\_\_  
(SIGNATURE OF PETITIONER)

Date: \_\_\_\_\_

\_\_\_\_\_  
(TYPE OR PRINT NAME)



\_\_\_\_\_  
(SIGNATURE OF PETITIONER)

**CONFIDENTIAL INFORMATION: If required to do so by local court rule, you must provide your date of birth and driver's license number on supplemental Form DE-147S. (Prob. Code, § 8404(b).)**







# Step 4:

# GATHER ASSETS

---

Forms in **BOLD** are attached and can be clicked on to open and view electronically if you are reading this packet on an internet enabled device.

## REVIEW EACH STEP CAREFULLY

- Complete all applicable items on the Administrative Duties Checklist.
- Complete **DE-160- Inventory and Appraisal** and **DE-161-Inventory and Appraisal Attachment**.
- Complete Final Accounting and Petition for Final Distribution.
  - There are no court forms for these. Both must be completed on **Pleading Paper**. Pleading Paper is used to describe the format of a legal document that has numbers 1-28 on the left side margin.
- If the tasks above can be completed before the next scheduled hearing date, you may request that it be rescheduled to an earlier date by completing **L-0836- Request for Expedited Hearing on Petition for Final Distribution**.
- Once the Court approves the Final Accounting and Petition for Final Distribution, begin to distribute property to persons receiving property from the estate. Each person must sign a receipt and all receipts must be filed with the Court.
  - Receipts must be prepared on **Pleading Paper**.
- After distribution is completed, request that the Court close the case and discharge the Personal Representative of responsibilities by completing **DE-295- Ex Parte Petition for Final Discharge and Order**.

### ADMINISTRATIVE DUTIES CHECKLIST

- Check Decedent's mail and personal belongings for any outstanding bills, bank accounts, investments, and other possible financial interests.
  - Any proceeds should be transferred to an estate bank account. **You cannot spend or give it to anyone yet.**
  
- If real property (for example, a house or vacant land) is part of the Decedent's Estate and no Probate Referee was assigned on your Order for Probate, complete **L-0042- Application and Order Appointing Probate Referee.**
  
- If real property is part of the Decedent's Estate, complete a Change in Ownership Statement – Death of Real Property Owner and if the property is to be distributed to a child or grandchild, also complete a Claim for Reassessment Exclusion for Transfer between Parents and Child or a Claim for Reassessment Exclusion for Transfer between Grandparent and Grandchild.
  - You can find these forms here:
    - <https://www.ocassessor.gov/forms>
  - These forms are not filed with the Court.
  
- Within four months after you are appointed, complete **DE-160- Inventory and Appraisal** and if applicable, **DE-161- Inventory and Appraisal Attachment.**
  - If real property is part of the Decedent's Estate, list the legal description and address of any real property leaving the value blank. Send this form to the appointed Probate Referee. Once it is returned with the appraised value, file it with the Court.
  
- Complete and send **DE-157- Notice of Administration of the Estate** to all known creditors.
  - This form is not filed with the Court.
  
- If a person inheriting is currently incarcerated or was formerly incarcerated, the California Victim Compensation Board must be informed no later than 90 days after the date **DE-150- Letters** are signed by a Judge. You can learn more here:
  - [Information for Offenders - CA Victim Compensation Board](#)
  
- Determine if you need to provide notice of death to the California Department of Health Care Services. You can learn more here:
  - [Estate Recovery \(ca.gov\)](#)
  
- Send notice of death to the Franchise Tax Board no later than 90 days after the date **DE-150- Letters** are signed by a Judge. You can learn more here:
  - [Deceased person \(Decedent\) | FTB.ca.gov](#)
  
- If income was earned by the decedent prior to death, personal income state and federal taxes may need to be filed.
  - If you are unsure, discuss your case with a lawyer or Certified Public Accountant.
  
- Determine whether an Estate Tax Return or Administrator Income Tax Return must be filed in your case.
  - If you are unsure, discuss your case with a lawyer or Certified Public Accountant.

***This checklist provides the basic information needed to administer a general probate estate with real property. It does not provide legal advice or take place of consulting with a lawyer.***

**SUPERIOR COURT, COUNTY OF ORANGE**

ATTORNEY OR PARTY WITHOUT ATTORNEY ( <i>Name and Address</i> ):	TELEPHONE NO:	FOR COURT USE ONLY
ATTORNEY FOR ( <i>Name</i> ):	ATTORNEY BAR #:	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF ORANGE 700 Civic Center Drive West Santa Ana, CA 92701		
IN THE MATTER OF THE ESTATE OF:		
<input type="checkbox"/> Minor <input type="checkbox"/> Conservatee <input type="checkbox"/> Decedent		
ORDER DESIGNATING PROBATE REFEREE		CASE NUMBER

IT IS ORDERED THAT

one of the probate referees provided for by law is designated the probate referee in the above-entitled proceeding to appraise property of the estate. The probate referee is also designated to reappraise from time to time for purpose of sale any or all of the estate property. If the estate is that of a decedent who died prior to the repeal of the California Inheritance Tax, the probate referee is designated to ascertain, determine and report to this court what, if any, inheritance tax is payable to the State of California by reason of the decedent's death.

DATE: \_\_\_\_\_

\_\_\_\_\_  
JUDGE/COMMISSIONER OF THE SUPERIOR COURT





ESTATE OF (Name):  <input type="checkbox"/> DECEDENT <input type="checkbox"/> CONSERVATEE <input type="checkbox"/> MINOR	CASE NUMBER:
--	--------------

### DECLARATION OF PROBATE REFEREE

9. I have truly, honestly, and impartially appraised to the best of my ability each item set forth in Attachment 2.  
 10. A true account of my commission and expenses actually and necessarily incurred pursuant to my appointment is:

Statutory commission:     \$

Expenses (*specify*):       \$

**TOTAL:**     \$

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

\_\_\_\_\_  
 (TYPE OR PRINT NAME)

\_\_\_\_\_  
 (SIGNATURE OF REFEREE)

### INSTRUCTIONS

(See Probate Code sections 2610-2616, 8801, 8804, 8852, 8905, 8960, 8961, and 8963 for additional instructions.)

1. See Probate Code section 8850 for items to be included in the inventory.
2. If the minor or conservatee is or has been during the guardianship or conservatorship confined in a state hospital under the jurisdiction of the State Department of Mental Health or the State Department of Developmental Services, mail a copy to the director of the appropriate department in Sacramento. (Prob. Code, § 2611.)
3. The representative, guardian, conservator, or small estate claimant shall list on Attachment 1 and appraise as of the date of death of the decedent or the date of appointment of the guardian or conservator, at fair market value, moneys, currency, cash items, bank accounts and amounts on deposit with each financial institution (as defined in Probate Code section 40), and the proceeds of life and accident insurance policies and retirement plans payable upon death in lump sum amounts to the estate, except items whose fair market value is, in the opinion of the representative, an amount different from the ostensible value or specified amount.
4. The representative, guardian, conservator, or small estate claimant shall list in Attachment 2 all other assets of the estate which shall be appraised by the referee.
5. If joint tenancy and other assets are listed for appraisal purposes only and not as part of the probate estate, they must be separately listed on additional attachments and their value excluded from the total valuation of Attachments 1 and 2.
6. Each attachment should conform to the format approved by the Judicial Council. (*See Inventory and Appraisal Attachment* (form DE-161/GC-041) and Cal. Rules of Court, rules 2.100—2.119.)

ESTATE OF (name):	CASE NUMBER:
-------------------	--------------

**INVENTORY AND APPRAISAL  
ATTACHMENT NO.:**

*(In decedents' estates, attachments must conform to Probate Code section 8850(c) regarding community and separate property.)*

Page:                      of:                      total pages.  
*(Add pages as required.)*

<u>Item No.</u>	<u>Description</u>	<u>Appraised value</u>
1.		\$



1  
2  
3  
4  
5  
6  
7  
8  
9  
10  
11  
12  
13  
14  
15  
16  
17  
18  
19  
20  
21  
22  
23  
24  
25  
26  
27  
28

1  
2  
3  
4  
5  
6  
7  
8  
9  
10  
11  
12  
13  
14  
15  
16  
17  
18  
19  
20  
21  
22  
23  
24  
25  
26  
27  
28

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated: \_\_\_\_\_, \_\_\_\_\_, Self-Represented

**NOTICE OF ADMINISTRATION  
OF THE ESTATE OF**

\_\_\_\_\_  
(NAME)

**DECEDENT**

**NOTICE TO CREDITORS**

1. (Name):  
(Address):

(Telephone):

is the **personal representative** of the **ESTATE OF** (name): \_\_\_\_\_, who is deceased.

2. The personal representative HAS BEGUN ADMINISTRATION of the decedent's estate in the

a. **SUPERIOR COURT OF CALIFORNIA, COUNTY OF** (specify):

STREET ADDRESS:

MAILING ADDRESS:

CITY AND ZIP CODE:

BRANCH NAME:

b. Case number (specify):

3. You must **FILE YOUR CLAIM** with the court clerk (address in item 2a) AND mail or deliver a copy to the personal representative before the **last to occur** of the following dates:

a. **four months** after (date): \_\_\_\_\_, the date letters (authority to act for the estate) were first issued to a general personal representative, as defined in subdivision (b) of section 58 of the California Probate Code, **OR**

b. **60 days** after (date): \_\_\_\_\_, the date this notice was mailed or personally delivered to you.

4. **LATE CLAIMS:** If you do not file your claim within the time required by law, you must file a petition with the court for permission to file a late claim as provided in Probate Code section 9103. Not all claims are eligible for additional time to file. See section 9103(a).

**EFFECT OF OTHER LAWS:** Other California statutes and legal authority may affect your rights as a creditor. You may want to consult with an attorney knowledgeable in California law.

**WHERE TO GET A CREDITOR'S CLAIM FORM:** If a *Creditor's Claim* (form DE-172) did not accompany this notice, you may obtain a copy of the form from any superior court clerk or from the person who sent you this notice. You may also access a fillable version of the form on the Internet at [www.courts.ca.gov/forms](http://www.courts.ca.gov/forms) under the form group Probate—Decedents' Estates. A letter to the court stating your claim is *not* sufficient.

**FAILURE TO FILE A CLAIM:** Failure to file a claim with the court and serve a copy of the claim on the personal representative will in most instances invalidate your claim.

**IF YOU MAIL YOUR CLAIM:** If you use the mail to file your claim with the court, for your protection you should send your claim by certified mail, with return receipt requested. If you use the mail to serve a copy of your claim on the personal representative, you should also use certified mail.

**Note:** To assist the creditor and the court, please send a blank copy of the *Creditor's Claim* form with this notice.

(Proof of Service by Mail on reverse)

Page 1 of 2

ESTATE OF <i>(Name)</i> :	CASE NUMBER:
DECEDENT	

[Optional]

**PROOF OF SERVICE BY MAIL**

1. I am over the age of 18 and not a party to this cause. I am a resident of or employed in the county where the mailing occurred.
2. My residence or business address is *(specify)*:
  
3. I served the foregoing *Notice of Administration to Creditors*  and a blank *Creditor's Claim* form\* on each person named below by enclosing a copy in an envelope addressed as shown below AND
  - a.  **depositing** the sealed envelope with the United States Postal Service with the postage fully prepaid.
  - b.  **placing** the envelope for collection and mailing on the date and at the place shown in item 4 following our ordinary business practices. I am readily familiar with the business's practice for collecting and processing correspondence for mailing. On the same day that correspondence is placed for collection and mailing, it is deposited in the ordinary course of business with the United States Postal Service in a sealed envelope with postage fully prepaid.
4. a. Date of deposit: \_\_\_\_\_ b. Place of deposit *(city and state)*: \_\_\_\_\_

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: \_\_\_\_\_

\_\_\_\_\_ \_\_\_\_\_

(TYPE OR PRINT NAME) (SIGNATURE OF DECLARANT)

**NAME AND ADDRESS OF EACH PERSON TO WHOM NOTICE WAS MAILED**

	<u>Name of person</u>	<u>Address (number, street, city, state, and zip code)</u>
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____
8.	_____	_____

List of names and addresses continued in attachment. *(You may use form POS-30(P) to show additional persons to whom a copy of this notice was mailed. Do not use page 2 of this form or form POS-030(P) to show that you personally delivered a copy of this notice to a creditor. You may use forms POS-020 and POS-020(P) for that purpose.)*

\* **NOTE:** To assist the creditor and the court, please send a blank copy of the Creditor's Claim (form DE-172) with the notice.





ATTORNEY OR PARTY WITHOUT ATTORNEY ( <i>Name &amp; Address</i> ):  Telephone No.: _____ Fax No. (Optional): _____ E-Mail Address (Optional): _____ ATTORNEY FOR ( <i>Name</i> ): _____ Bar No: _____	<i>FOR COURT USE ONLY</i>
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF ORANGE</b> COSTA MESA JUSTICE COMPLEX 3390 Harbor Boulevard Costa Mesa, CA 92626	
ESTATE OF ( <i>name</i> ): _____	
<b>REQUEST FOR EXPEDITED HEARING ON          PETITION FOR FINAL DISTRIBUTION</b>	CASE NUMBER: _____

**This form may only be used to request an expedited hearing on a petition for final distribution in a decedent's estate proceeding.**

I am  the personal representative of the above-referenced estate.  
 the attorney of record for the personal representative of the above-referenced estate.

On \_\_\_\_\_, I filed a petition for final distribution of that estate.

All persons entitled to notice have been given or will be given proper notice of the hearing on the petition for final distribution, or have waived or will waive notice of the hearing, as provided by the Probate Code and the California Rules of Court. Proof of such notice and/or waivers have been or will be filed at least five court days before the first hearing on the petition for final distribution.

I do not expect there will be any opposition to the petition.

I therefore ask that the petition for final distribution be set for an expedited hearing.

I understand that an expedited hearing on the petition for final distribution will be continued to the next available, non-expedited hearing date if: (1) there are deficiencies identified in the Probate Notes that remain uncured as of five days before the expedited hearing; or (2) an opposition to the petition for final distribution is filed. If the expedited hearing is continued, it will be my responsibility to ensure that notice of the continued hearing date is given to all persons entitled to notice.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: \_\_\_\_\_

\_\_\_\_\_  
 Personal Representative or Attorney for  
 Personal Representative

\_\_\_\_\_  
 Type or Print Name

