

**LETTERS PROBATE CHECKLIST**

- Make four notarial copies of the will.

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- Contact deceased's accounts to get values for estate *if applicable*

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- Gather Notice to Creditor Rates for client *if applicable*

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- Draft Notice to Creditor Ad *if applicable*

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- Draft Application for Letters Probate

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- Affidavit of Applicant

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- Application for Grant of Probate

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- Affidavit of Execution of Will

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- Schedule of Assets

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- Certificate of No Infants (two copies) *only if there is real estate*

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- Transmission or Surviving Joint Tenant docs *(if any real estate)*

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- Book Letters Probate Application Signing appointment with Client
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- Send letter to Estate Account bank requesting probate fee (calculate fee)
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- Receive Probate Fee cheque from bank (make photocopy) or client
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- Draft Court of Queen's Bench letter sending Application for Letters Probate docs
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- Send Application via court run to the Queen's Bench Court
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- Diarize File for Two Weeks for issuance of Letters Probate
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- Make a minimum of three notarial copies of the letters probate once received
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- Determine if we are to continue on with administration of the estate
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- Draft applicable Reporting Letter
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- Draft Statement of Account
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- Mail out Reporting Letter Package
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- Diarize file for one month

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- After one month call client to confirm that we will not be dealing with file

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