

Probate & Trust Seller's Roadmap

A simple checklist for every phase — and the questions to ask your attorney along the way



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YOUR THREE-PHASE ROADMAP

 PHASE 1 Petition & Appointment	 PHASE 2 Estate Administration	 PHASE 3 Final Accounting & Distribution
3–4 MONTHS	4+ MONTHS	3–6 MONTHS
WHAT'S HAPPENING ✓ Petition for Probate filed with the court ✓ Court hearing scheduled (~5–8 weeks out) ✓ Order for Probate & Letters issued	WHAT'S HAPPENING ✓ Notice to Creditors mailed (starts 4-month window) ✓ Property listed, marketed, and sold ✓ Escrow closes; proceeds held in estate account	WHAT'S HAPPENING ✓ Final Accounting prepared and filed with the court ✓ Court hearing to approve accounting & distribution ✓ Final Order for Distribution signed by the judge
ASK YOUR ATTORNEY "Do we have Full or Limited Authority?" "When can we legally list the property?"	ASK YOUR ATTORNEY "What documents does escrow need from you?" "Are there any creditor claims I should know about?"	ASK YOUR ATTORNEY "When will heirs actually receive funds?" "Is anything likely to delay this hearing?"

KEY MILESTONES

1	—	2	—	3	—	4
Petition		Letters		Home Listed		Funds
Filed		Issued		& Sold		Distributed

Want Help Navigating Your Specific Situation?

Book a free 15-minute consultation — no cost, no pressure.

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For general educational purposes only — not legal, tax, or financial advice. Every estate is different — please consult a licensed probate attorney for guidance specific to your situation.