

APPOINTMENT AS PERSONAL REPRESENTATIVE



PINAL COUNTY

**THE APPOINTMENT AS PERSONAL REPRESENTATIVE,
NOTICE OF APPOINTMENT, INVENTORY AND
APPRAISEMENT**

INSTRUCTIONS AND FORMS

**Provided as a Public Service by
Amanda Stanford
Clerk of the Superior Court**

THE APPOINTMENT, NOTICE OF APPOINTMENT, INVENTORY AND APPRAISEMENT

This packet contains court forms about the Appointment, the Notice of Appointment and the Inventory and Appraisement, whether or not there was a Will. Be sure this packet contains the following documents.

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You have permission to use these documents 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.

CHECKLIST

APPOINTMENT OF PERSONAL REPRESENTATIVE AND ADMISSION OF WILL (If Applicable)

USE THE FORMS AND INSTRUCTIONS in this packet only if the following factors apply to your situation:

- ✓ You have been appointed Personal Representative of the estate of a person that died.

AND

- ✓ You have signed the Acceptance of Appointment and are ready to give notice that you have been appointed.

READ ME: It is very important for you to know that when you sign a court document, you may be helping or hurting your case. Before you sign any court document, or get involved with a court case, it is important that you see a lawyer to make sure you are doing the right thing.

PROCEDURES

WHAT TO DO AFTER YOU ARE APPOINTED PERSONAL REPRESENTATIVE

USE THIS PACKET only if you have been appointed the Personal Representative of the Estate in an Informal Probate. **USE ONLY BLACK INK TO FILL OUT THE FORMS.**

1. NOTICES AND ORDERS YOU MUST SEND AFTER THE LETTERS ARE ISSUED:

A. NOTICE OF APPOINTMENT and/or ADMISSION of WILL:

- Within **ten (10) days** of your appointment you must complete this Notice and mail or deliver a copy of the Notice to everyone entitled to notice. This includes all interested person. If your case involves a Will, check the boxes that say appointment and admission, if your case does not involve a Will, only check the boxes that say appointment of personal representative.
- If there is a Will, attach a copy of the Will to the Notice.
- Complete the ***Proof of Delivery/Mailing of Notice***, and file it and the original Notice with the Clerk of Superior Court Probate Registrar.

B. ORDER TO PERSONAL REPRESENTATIVE:

- Within **ten (10) days** of your appointment you must mail a copy of the Order to Personal Representative to everyone entitled to notice. This includes all interested persons.
- Complete the Proof of Delivery/Mailing of ***Order of Personal Representative***, and file the original ***Proof of Notice*** with the Clerk of Superior Court Probate Register. To simplify things, we have combined the ***Proof of Notice for the Order to Personal Representative*** and the ***Notice of Appointment and/or Admission of Will*** into one document ***Proof of Delivery***.

C. NOTICE TO CREDITORS:

- Complete the Notice to Creditors included in this packet and mail it to all creditors you know about. File the original ***Notice of Creditors*** with the Clerk of Superior Court Probate Registrar.
- Publish the Notice to Creditors. You must do this just in case there is a creditor who is not aware of this matter. Publish in a newspaper of general circulation in this county, once a week for three (3) weeks in a row. Use the letter in this packet to help you.
- The newspaper will usually file the original ***Affidavit of Publication*** and return a copy to you. If the newspaper returns the original ***Affidavit of Publication*** to you, file it with the Clerk of Superior Court Probate Registrar.
- Complete the ***Proof of Notice to Creditors*** and file the original with the Clerk of Superior Court Probate Registrar.

2. DOCUMENTS YOU MUST COMPLETE:

A. INVENTORY AND APPRAISEMENT OF ASSETS IN THE ESTATE:

- Within **ninety (90) days** after your appointment as Personal Representative you must prepare an inventory of property owned by the person who died. You must list the property with reasonable detail, estimate its fair market value, tell whether it was held as community or separate property, and what kind of any encumbrances/liens on the property might exist.
- You can hire an appraiser to determine fair market value if there is reasonable doubt about some asset. If you do this be sure the appraiser is qualified and disinterested. List the name and address of appraisers on the inventory, and list which item(s) he or she appraised.
- After the inventory is completed, do one of the following:
 - a. You may file the inventory with the court and send copies to any interested person who requests it, **OR**
 - b. You can choose not to file it, but then you must deliver or mail a copy of inventory to each of the heirs or people named in the will and other interested person who requests it. If you do this, complete the Proof of Mailing or Delivery of Inventory and Appraisal that is in your packet and file it with the Clerk of Superior Court Probate Registrar.
- If at any time while you are administering the Estate you realize that you failed to list some item in the inventory, or the value or description of the asset was wrong, you must file a supplementary inventory with the new information, and file it with the Clerk of the Superior Court Probate Registrar and give copies to interested parties. You may choose not to file it, but you must give copies to interested parties and file ***Proof of Mailing or Delivery of Supplementary Inventory*** with the Clerk of Superior Court Probate Registrar.

3. NOW PROCEED WITH ADMINISTRATION AND CLOSING THE ESTATE:

Go to the packet called ***Administering and Accounting before Closing the Estate*** and the packet called ***Closing the Estate***.

Name of Person Filing: _____
Street Address: _____
City, State, Zip Code: _____
Telephone Number: _____
Email Address: _____
ATLAS Number (if applicable) _____
 Representing Self (No Attorney) or Represented by Attorney
If Attorney, Bar Number: _____

**SUPERIOR COURT OF ARIZONA
PINAL COUNTY**

In the Matter of the Estate of

CASE NUMBER: PB 2

**NOTICE OF:
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”)

_____ an Adult a Minor, deceased

HONORABLE: _____

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

2. **MY NAME AND ADDRESS:**

My Name is: _____

My Address is: _____

3. **DOCUMENTS FILED:** On _____ I filed the following document with the court:

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”

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 available for your inspection and are on file with the Court at the address listed below:

**Clerk of the Superior Court
Pinal County Justice Complex**
971 Jason Lopez Circle Bldg A
Florence AZ 85132
(520) 866-5300

7. **COPY OF WILL: (Only if there is a Will)** a copy of the Will is attached to this Notice for you. You have four (4) months from the date you receive this Notice to begin a Formal probate case.

(Date)

(Signature)

(Print Name)

Name of Person Filing: _____
 Street Address: _____
 City, State, Zip Code: _____
 Telephone Number: _____
 Email Address: _____
 ATLAS Number (if applicable) _____
 Representing Self (No Attorney) or Represented by Attorney
 If Attorney, Bar Number: _____

**SUPERIOR COURT OF ARIZONA
 PINAL COUNTY**

In the Matter of the Estate of

CASE NUMBER: PB 2

PROOF OF DELIVERY OR MAIL OF

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

_____ an Adult a Minor, deceased

HONORABLE: _____

STATE OF ARIZONA)
 COUNTY OF PINAL) ss.

1. **DOCUMENTS:** I delivered or mailed by first class mail, postage prepaid a copy of the following documents:
 (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 documents 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)

SUBSCRIBED AND SWORN TO before me this _____ day of _____ 20 _____

My Commissions Expires:

By: _____
(Deputy Clerk/Notary Public)

Name of Person Filing: _____
 Street Address: _____
 City, State, Zip Code: _____
 Telephone Number: _____
 Email Address: _____
 ATLAS Number (if applicable) _____
 Representing Self (No Attorney) or Represented by Attorney
 If Attorney, Bar Number: _____

**SUPERIOR COURT OF ARIZONA
 PINAL COUNTY**

In the Matter of the Estate of

CASE NUMBER: PB 2

**NOTICE TO CREDITORS OF INFORMAL
 APPOINTMENT AND/OR INFORMAL
 REPRESENTATIVE AND/OR INFORMAL
 PROBATE OF A WILL**

an Adult a Minor, deceased

HONORABLE: _____

NOTICE IS GIVEN THAT:

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

2. **DEADLINE TO MAKE CLAIMS.** All persons having claims against the Estate are required to 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 creditors.

Date: _____

 (Personal Representative)

 (Print Name)

(Print Name)

(Print Address)

(Month / Day / Year)

(Name of Newspaper)

(Address)

RE: PB 2

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 (3) 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 completed, please file the original Affidavit of Publication with the Court and send me one copy.

Thank you for your help in this matter.

Yours truly,

(Signature)

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

Name of Person Filing: _____
 Street Address: _____
 City, State, Zip Code: _____
 Telephone Number: _____
 Email Address: _____
 ATLAS Number (if applicable) _____
 Representing Self (No Attorney) or Represented by Attorney
 If Attorney, Bar Number: _____

**SUPERIOR COURT OF ARIZONA
 PINAL COUNTY**

In the Matter of the Estate of

CASE NUMBER: PB 2

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

_____)
 an Adult a Minor, deceased

HONORABLE: _____

STATE OF ARIZONA)
 County of Pinal) ss.

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: _____

SUBSCRIBED AND SWORN TO before me this _____ day of _____ 20 _____

My Commission Expires:

By _____
(Deputy Clerk / Notary Public)

Name of Person Filing: _____
Street Address: _____
City, State, Zip Code: _____
Telephone Number: _____
Email Address: _____
ATLAS Number (if applicable) _____
 Representing Self (No Attorney) or Represented by Attorney
If Attorney, Bar Number: _____

**SUPERIOR COURT OF ARIZONA
PINAL COUNTY**

In the Matter of the Estate of

CASE NUMBER: PB 2

**INVENTORY AND APPRAISEMENT
AND PROOF OF MAILING**

_____)
 an Adult a Minor, deceased

HONORABLE: _____

STATE OF ARIZONA)
County of Pinal)ss.

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

- 1. TRUE AND CORRECT STATEMENT:** The following inventory of property is a true and correct statement of all 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 my appointment, 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**

Signature: _____

Print Name: _____

SUBSCRIBED AND SWORN TO before me this _____ day of _____ 20 _____

My Commission Expires:

By _____
(Deputy Clerk / Notary Public)

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	Dollars of Debt
1.	_____			
2.	_____			
3.	_____			
4.	_____			
5.	_____			
6.	_____			
7.	_____			
8.	_____			

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

Total estimated debt on real property: \$ _____

B. Information About Real Property Items Listed Above That Were Appraised:

Name	Address	Item Number Above
_____	_____	
_____	_____	
_____	_____	
_____	_____	

PERSONAL PROPERTY

A. General Information:

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

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

Total estimated debt on real property: \$ _____

B. Information About Personal Property Items Listed Above That Were Appraised:

Name	Address	Item Number Above

