

WORKSHEET 15—PROBATE CHART FOR ALL ACTIVE ESTATES REPRESENTED BY THIS FIRM

Name of Decedent Docket Number & Court Employer Identification Number	Type (1)	L/S (2)	DOD (3)	Hearing (4)	Qual. (5)	Notice (6)	Aff./Cert. of Notice (7)	Inv. or Aff. (8)	BF (9)	CSA (10)	Pending Items

(1) IA = Independent Administration; MT = Muniment of Title; ADE = Administration with Dependent Executor; AWA = Administration with Will Annexed; PDH = Proceeding to Determine Heirship; SE = Small Estate; RDA = Regular Dependent Administration; TDA = Temporary Dependent Administration; TBA = Testate IA by Agreement; IBA = Intestate IA by Agreement; AP = Ancillary Probate; RW = Recording of Will. (2) Initials of responsible lawyer and staff members. (3) DOD = Date of death. (4) Hearing = Date of hearing or, if no hearing, date judge signs order. (5) Qual. = Qualification date for executor or administrator. (6) Notice = Notice to testamentary beneficiaries—60 days after will probated. (7) Aff./Cert. of Notice = Affidavit or certificate of notice—90 days after will probated. (8) Inv. or Aff. = Due date for inventory or affidavit in lieu of inventory—90 days after qualification (after will probated, if muniment of title). (9) BF = Beneficiary finalization date for individual retirement arrangement—September 30 of year following participant’s death. (10) CSA = Deadline for creating separate IRA accounts—December 31 of year following participant’s death.

Pending Items: Note here other deadlines (or that lawyer and staff are not responsible for these items)—FYE = Fiscal year end of estate. AVD = Alternate valuation date—6 months after death. Est. Tax = Federal estate tax return—9 months after death or as extended. D’s Tax = D’s income tax return—April 15 of applicable year(s) or as extended. Fid. Tax = Fiduciary income tax return—15th day of 4th month following fiscal year end (April 15 if fiscal year is calendar year) or as extended. Dis. = Disclaimer—9 months after date of death.