

The Arizona Executor's Checklist

A Step-by-Step Guide for Personal Representatives — Phoenix Metro Area

Being appointed Personal Representative of an estate is an honor — and a significant responsibility. This checklist is designed to help you understand what needs to happen, roughly in what order, so nothing falls through the cracks.

PHASE 1: IMMEDIATELY AFTER APPOINTMENT

- Obtain certified copies of the Death Certificate**
Order at least 10–15 certified copies. You'll need them for banks, courts, insurance companies, and real estate transactions. It's always easier to order more now than to reorder later.
- Secure all estate property**
Change locks on real property if necessary. Notify homeowner's insurance that the property is now vacant — most policies require this within 30–60 days of vacancy.
- Locate and review the Will**
Find the original signed Will and deliver it to the probate court. Keep copies for your records and for the estate attorney.
- Hire a probate attorney**
An experienced probate attorney is essential. They will file the appropriate paperwork, guide you through the court process, and protect you from personal liability.
- Open an estate bank account**
All estate funds — including sale proceeds — must flow through a separate estate account. Never co-mingle estate money with personal funds.
- Notify known creditors**
You are required to notify known creditors of the death. Your attorney will advise you on the proper notice procedure under Arizona law.

PHASE 2: WITHIN THE FIRST 60 DAYS

- Create a complete inventory of estate assets**
Document all real property, vehicles, financial accounts, personal property, and any business interests. Your attorney will use this for the estate inventory filing.
- Contact a Certified Probate Real Estate Specialist**
If the estate includes real property, contact a C.P.R.E.S.™ specialist early — not after months of vacancy costs have accumulated. A free market analysis can be done within days of your appointment.
- Notify Social Security and other benefit agencies**
If the decedent was receiving Social Security, pension, or other government benefits, notify the appropriate agencies promptly. Failure to do so can result in overpayment that must be returned.



Executor's Checklist — Arizona Probate Institute

■ Review ongoing obligations

Identify recurring bills — mortgage, property taxes, HOA fees, utilities, insurance — and make sure the estate account is funded to cover them during the probate period.

■ File for EIN (Employer Identification Number)

The estate needs its own EIN from the IRS for tax reporting purposes. Your CPA can assist with this.

PHASE 3: MANAGING THE REAL PROPERTY

■ Get a current market analysis

Your C.P.R.E.S.™ specialist will provide a Comparative Market Analysis at no charge. This gives you defensible data for pricing and protects you from heir disputes.

■ Decide: sell now or wait?

In most Arizona probate cases, you can sell the property as soon as you receive your Letters of Personal Representative — you do NOT have to wait until probate closes. Every month you wait costs the estate money.

■ List the property

Work with your probate real estate specialist to list the property, coordinate showings, and negotiate offers on behalf of the estate.

■ Understand court confirmation requirements

Some Arizona probate sales require court confirmation; many do not. Your attorney and real estate specialist will guide you on which applies to your situation.

■ Review all offers carefully

All offers should be reviewed in light of the estate's best interest — not any individual heir's preference. Your specialist can help you evaluate each offer objectively.

PHASE 4: CLOSING AND DISTRIBUTION

■ Collect and deposit sale proceeds

All sale proceeds go directly into the estate account. No heir receives distribution until debts, taxes, and expenses are paid.

■ Pay estate debts and expenses

Use the estate account to pay valid creditor claims, attorney fees, real estate commissions, and any other legitimate estate expenses.

■ File the final tax return

The estate may require a final individual income tax return for the decedent, as well as an estate income tax return (Form 1041). Your CPA handles this.

■ Distribute to heirs

After debts, taxes, and expenses are paid, distribute the remaining assets to heirs as directed by the Will or, if no Will exists, by Arizona intestate succession law.



Executor's Checklist — Arizona Probate Institute

■ File for court discharge

Your attorney will file for a formal discharge from the court, releasing you from your duties as Personal Representative. Keep all records for at least 3 years.

■■ Important: This checklist is a general guide and does not constitute legal advice. Every estate is different. Always work with a licensed Arizona probate attorney for legal guidance specific to your situation.

■ Free Consultation — No Obligation

Tim Hensley · C.P.R.E.S.™ · 480-535-1950 · arizonaprobateinstitute.com · tim@arizonaprobateinstitute.com

HomeSmart Realty · Licensed Arizona Real Estate Broker · License #BR584387000 · Equal Housing Opportunity