

FINAL SETTLEMENT & ACCOUNTING- CHECKLIST
PROBATE

58 O.S. §§ 611; 541-547
Interim (§§ 541-551)

Case No: PB- _____
Estate of: _____
Attorney: _____
Phone No. _____

D/O/D: _____

_____ **TESTATE** _____ **INTESTATE**

_____ Transcript paid (58 O.S. §44(d))

DEBTS: (58 O.S. §§ 331-345; 589-591; 632.3)

_____ Notice to Creditors
_____ Creditors Affidavit; Mailing _____; Non-Mailing _____; Date Published _____

INVENTORY: (58 O.S. § 281 - 282)

_____ Inventory & Appraisal

FINAL ACCOUNT & NOTICE OF HEARING: (58 O.S. §§ 550, 553-557; 634)

_____ Final Account verified
_____ Order & Notice of Hearing
_____ Affidavit of Mailing (w/Notice Attached)
_____ Proof of Publication

HEIR SHIP DISTRIBUTION: (84 O.S. §§ 212-213)

_____ Spouse _____ Predeceased _____ Divorced
_____ Children _____ Grandchildren
_____ Siblings _____ Nieces & Nephews _____ Parents _____ Other _____ Trust

FEES: (58 O.S. §§ 525; 527; Contest § 66)

\$ _____ Personal Representative \$ _____ Attorney
\$ _____ PR Reimbursements \$ _____ Costs

COURT'S ORDER: (58 O.S. §§ 631-632)

_____ Judicial Inquiry (Notice to Creditors) (§ 632.3)
_____ Approve Final Account _____ Supplemental Final Account
_____ Determination of Heirs (Tes. 58 O.S. § 23, 84 O.S. § 45; Intest. 84 O.S. § 213)
_____ Order of Distribution (58 O.S. §§ 631-634; 693-695)
_____ Termination of Joint Tenancy (58 O.S. §§ 911-912; 60 O.S. § 74)
_____ Discharge _____ Receipts Filed (§§ 556; 691)