



Register of Wills

CLOSING OF ESTATE CHECKLIST

After eight months has passed from the decedent's date of death, you may submit your paperwork in-person or via mail to begin the process of closing the estate. After the documentation is audited, the accounting clerk will email you a DRAFT Final Accounting. Once reviewed, you may call to schedule an appointment to close the estate. **Please make sure that all items on this checklist are completed and ready for review.** If items are missing, your documentation will not be accepted.

- ☐ Completed Accounting Form
- ☐ Proof of each expense listed on the Accounting Form (invoices/bills)
- ☐ Proof for payment of each expense such as:
 - Estate checking account bank statements
 - Receipts
 - Credit card statements
- ☐ All claims filed against the estate have been addressed:
 - Claim Satisfaction from claimant for claims that have been paid/satisfied
 - Claim Rejection Letter mailed certified to claimant
 - Submit the green certified mail receipt and a copy of the letter.
 - ***Estates cannot be scheduled for closing if a Claim Rejection has not been on file for more than 3 months, as claimants have 90 days from the date of rejection to file a rebuttal.***
- ☐ Completed List of Beneficiaries
- ☐ Signed Notice for each Beneficiary
- ☐ Self-addressed, stamped envelope(s) for each Beneficiary Notice & Waiver.
 - The Beneficiary Waiver cannot be filed prior to the closing appointment. We will not accept faxed/e-mailed copies of the Waiver(s).
 - **Note:** Our office must receive the **original, signed Beneficiary Waiver(s)** from each beneficiary before the final Accounting Affidavit can be signed by Chief Deputy. If, after 90 days, signed waivers have not been received, the final Accounting Affidavit will be signed, and the estate will be closed.
- ☐ Accounting Affidavit (attorneys only)

For additional form Waivers and Notices, please visit

<https://www.kentcountyde.gov/Residents/Wills-Estates/New-Register-of-Wills-Forms> .