

How to navigate probate: a practical checklist for executors

If you've been named executor, probate is likely your first and biggest hurdle. Probate is the legal process that validates a will, appoints you formally as executor, and oversees how assets and debts are handled.

At Alix, we've created a simple practical **roadmap** to reduce stress, avoid mistakes that may increase costs, and help you move forward with confidence.

Why this checklist matters:

- ✓ Most estates take **12-18 months** to settle through probate.
- ✓ Executors spend **600-900 hours** handling tasks without help.
- ✓ Even one missed filing can trigger court delays, penalties, or extra fees.

This guide won't make probate instant, but it will give you clear direction, protect the estate's value, and support you in taking the right steps forward.



Step 1. File the will & petition for probate

- ✓ Locate the original signed will.
- ✓ File it with the probate court in the county of residence.
- ✓ Complete the petition to be formally appointed executor.
- ✓ Pay the initial court filing fee.



Main challenge: Probate forms are highly state-specific. Errors mean rejected filings and costly resubmissions.



How Alix helps: We prepare and file the required probate paperwork, ensuring every detail is correct and deadlines are met.

Step 2. Notify beneficiaries & creditors

- ✓ Notify heirs and beneficiaries with official court forms.
- ✓ Publish required legal notice to creditors in local newspaper.
- ✓ Track claims, disputes, and required responses.



Main challenge: Courts require strict proof that notices were delivered correctly. Miss one step and the process restarts.



How Alix helps: We handle all notices, track creditor deadlines, and maintain court-ready documentation.

Step 3. Secure & inventory estate assets

- ✓ Safeguard property (change locks, forward mail, insure property).
- ✓ Create an inventory of all estate assets: real estate, vehicles, valuables, accounts.
- ✓ Obtain appraisals when required by the court.



Main challenge: Executors are personally liable if assets are lost, stolen, or undervalued.



How Alix helps: We conduct full inventories, coordinate appraisals, and ensure assets remain protected until transfer.

Step 4. Manage debts & expenses

- ✓ Collect bills, loans, and medical invoices.
- ✓ Verify which debts are valid, and which may be negotiated or discharged.
- ✓ Pay ongoing expenses (utilities, insurance, mortgage).



Main challenge: Over 70% of people die with debt. Pay the wrong bills, too soon, or from the wrong source, and you risk personal liability.



How Alix helps: We negotiate directly with creditors to reduce or eliminate claims, preserving estate value for heirs.

Step 5. File court reports & tax returns

- ✓ Submit required probate accountings to the court.
- ✓ File the final income tax return (Form 1040).
- ✓ File fiduciary income tax return (Form 1041) if needed.
- ✓ Prepare state-specific inheritance or estate tax filings (if applicable).



Main challenge: Probate and tax filings come with strict rules. One error can mean rejected filings, penalties, or even personal liability for the executor.



How Alix helps: Your Alix probate attorney files the required legal documents, while our Care Team prepares supporting paperwork, tracks finances, and files taxes accurately and on time.

Step 6. Distribute assets & close probate

- ✓ Obtain court approval for distributions.
- ✓ Transfer titles of property, vehicles, and accounts.
- ✓ Deliver inheritances to beneficiaries.
- ✓ Request final discharge from the court.



Main challenge: One missed transfer or unsigned release can delay closing probate for months.



How Alix helps: We manage every transfer, keep beneficiaries updated through the Alix App, and ensure probate officially closes without loose ends.

You don't have to do probate alone

As the executor, **you stay in charge**. You make the decisions and ensure your loved one's wishes are honored. Alix takes on the hard parts: the paperwork, deadlines, and creditor calls that can overwhelm and delay the process. We handle the heavy lifting so you can focus on your family, all for one flat fee:

- ✓ **Executor control with full support.** You decide, we prepare and carry out.
- ✓ **Network of licensed probate attorneys in every state** to handle required court filings and legal oversight.
- ✓ **A Care Team that manages paperwork, debts, taxes, and logistics** so nothing slips through the cracks.
- ✓ **The Alix App that keeps your family updated** and reduces disputes.

With Alix, you keep the authority and peace of mind while we make sure every task is done right and on time.