

CLOSING THE ESTATE

Note: Item 214 of this Checkplan does not apply to MT, SE, or PDH. Most practitioners do not follow this procedure for IA, TBA, IBA, or AP (independent). Estates Code, Sections 405.004–.007, provide for closing an independent administration by closing report or notice of closing estate (which also cancels the letters issued to the personal representative). These procedures are not covered by this System.

214. Closing the estate. After all property has been distributed and all receipts have been filed, do the following:

- a. Prepare Application to Close Estate and to Discharge Personal Representative (Form 67) and Order Closing Estate and Discharging Personal Representative (Form 68).
- b. File Application to Close Estate and to Discharge Personal Representative (Form 67) and Order Closing Estate and Discharging Personal Representative (Form 68) with clerk of court. Enter date of filing as Item 84a of SDL.
- c. Determine if court hearing will be required and, if so, do the following:
 - (1) Obtain a date and time for hearing and enter date as Item 84b of SDL. Determine method of appearance for the hearing, and if remote, prepare Notice of Court Proceeding (Form 150), Motion for Remote Proceeding (Form 151), and Certificate of Service (Form 152)
 - (2) Notify executor or administrator of time and date of hearing and the method of appearance before the court. If notifying by mail, prepare and send Letter 19 to executor or administrator.
 - (3) Attend hearing, present proof necessary for court's approval, have Order Closing Estate and Discharging Personal Representative (Form 68) signed by judge closing estate, and enter date order signed as Item 84e of SDL.
- d. If hearing was not required, determine date Order Closing Estate and Discharging Personal Representative (Form 68) was signed and enter date as Item 84e of SDL.
- e. Prepare and send Letter 79 to the surety, together with a copy of the Order Closing Estate and Discharging Personal Representative (Form 68).
- f. Conform file copies of all documents for dates and signatures.

NA	L	S	DATE	INITIALS