

**COURTS INSTRUCTIONS TO THE
DEPENDENT ADMINISTRATOR OF AN ESTATE**

CONSULT WITH YOUR ATTORNEY (NOT THE COURT STAFF)
ON ANY MATTER REGARDING THIS ESTATE THAT YOU DO NOT UNDERSTAND

As the duly appointed Dependent Administrator of this Estate, you are advised that you must do the following:

1. File your Oath and \$_____ (corporate/personal surety) Bond within **twenty (20) days** from the date the court signs the order appointing you.
2. File your Inventory, Appraisal and List of Claims within ninety (90) days from the date the last document is filed No.1;
3. If the Estate is not closed within the first year, then file your Annual Account one year after taking your oath/bond and every year thereafter until the estate is closed. You must retain your bank statements, cancelled checks, invoices and receipts to substantiate the receipts and disbursements of the estate. **Attached is the standard Annual Account form provided by the court, in order to complete this form please see your attorney.**
4. Within thirty (30) days, publish in a local newspaper your Notice to Creditors of the Estate. **File the Publisher's Affidavit with original newspaper article with the Court.**
Within two (2) months, give your Notice by registered mail to each holder of a real estate lien against estate property and to each person you have knowledge of having a claim against the estate. **Proof of the above notices must be filed with the Court.**
5. **For every person who dies on or after September 1, 2007, the personal representative appointed after a will is probated must notify all beneficiaries named in the will within sixty (60) days of the date the will is probated. The notice must include a copy of the will and order admitting it to probate. Waivers are permitted. Personal representatives must prove that they complied with the requirements by filing an affidavit within 90 days of the probate.**
6. Place all estate funds in insured accounts in the name of the estate. Retain in a checking account only such funds that are reasonably necessary to pay the debts of the decedent and the expenses of administering this estate. Place all additional funds in interest-bearing accounts at the highest interest rate then available;
7. Obtain a written order of this court authorizing any expenditure of estate funds before any such expenditures are made including payment for attorneys fees.
8. Maintain an accurate record of all expenditures and receipts of estate funds before any such expenditure are made including payment for attorney's fees.
9. Maintain an accurate record of all expenditures and receipts of estate funds; it is vital that all copies of cancelled checks, invoices and receipts be retained to verify expenses.
10. Preserve, protect and insure, if insurable, all non-cash assets of this estate.
11. Obtain a written order of this court before attempting to sell, lease, transfer or otherwise dispose of any non-cash assets of this estate.
12. If the estate is or will be involved in lawsuit, obtain authority from the court to hire the attorney to represent the estate and **do not** settle lawsuit without first obtaining Court authority.

13. Do Not transfer any assets to heirs without first obtaining Court authority.
14. Final Distribution of assets will not be approved until Judgment Declaring Heirship has been filed and approved by the court.
15. File your **Final Accounting** when the estate is ready to be closed:
 - a. Send each heir of the estate a copy of the accounting and obtain a waiver of service from the heir.
 - b. Once the Final Accounting has been approved, distribute the remaining assets in accordance with the order approving the Final Accounting.
 - c. Obtain signed receipt and releases from each heir and/or creditor showing distribution of assets of estate.
 - d. File **Application to Close Estate and Discharge Dependent Administratrix and Sureties**, along with receipts and releases.
 - e. Send copy of the Order Closing Estate and Discharging Dependent Administratrix and Sureties to bond company.
16. **YOU ARE RESPONSIBLE FOR NOTIFYING THE COURT IN WRITING OF ANY CHANGES IN YOUR ADDRESS AND PHONE NUMBER.**

GRAYSON COUNTY CLERK
 Probate Clerk
 200 S. Crockett, Suite 212A
 Sherman, TX 75090
 (903) 813-4241

I / We, the undersigned Dependent Administrator(s) of this estate, hereby attest that I / We have read the above and understand its contents.

 Dependent Administrator

 Date

 Administrator

 Date