



PROBATE ADMINISTRATION

If you've recently lost a loved one and are facing the legal process of probate, we understand how difficult and unfamiliar this time can be. Probate in California is a court-supervised procedure used to settle a person's estate—validating their will, paying debts and taxes, and distributing assets to heirs or beneficiaries. Whether the estate is large or small, and whether there's a will or not, our experienced team is here to guide you through each step with clarity, compassion, and efficiency.

Information Gathering

Before we schedule your initial probate consultation, we'll ask you to gather a few key documents—typically the **death certificate**, any **will or codicils**, and basic information about the decedent's assets and heirs. Using this information, we'll conduct a routine **conflict of interest check** to ensure there are no existing matters or relationships that would prevent us from representing you.

Once the conflict check is cleared, we'll send you a brief **questionnaire** to help us understand the estate and your role as the proposed personal representative. Completing this ahead of time allows us to tailor our meeting to your specific needs and provide focused, efficient guidance from the start.

What to Expect in Your Consultation

During your initial consultation, we'll walk through any estate planning documents together and discuss your qualifications and responsibilities as the personal representative. This meeting sets the foundation for the administration process, which we'll guide you through in four essential stages: (1) filing the petition and opening the estate, (2) identifying and managing estate assets, (3) paying debts, taxes, and expenses, and (4) distributing assets and closing the estate. Our goal is to ensure you feel confident in your role and fully supported every step of the way.

Administration Process

We break the probate administration process into four stages:

Stage 1: Filing the Petition and Opening the Estate

We begin by preparing and filing the petition with the probate court to officially open the estate. This includes submitting the will (if one exists), requesting appointment of the personal representative (executor or administrator), and notifying interested parties. Once approved, the court issues **Letters of Administration** or **Letters Testamentary**, granting authority to manage the estate.





Stage 2: Identifying and Managing Estate Assets

Next, we assist in locating, securing, and valuing all assets owned by the decedent. This may include real property, bank accounts, investments, and personal belongings. We also help ensure proper management of these assets during the probate process, including maintaining insurance and handling ongoing financial obligations.

Stage 3: Paying Debts, Taxes, and Expenses

The personal representative is responsible for notifying creditors, paying valid debts, and filing any required tax returns. We guide you through this process, including preparing an inventory and accounting, and ensuring all obligations are met before distributions are made.

Stage 4: Distributing Assets and Closing the Estate

Once debts and taxes are resolved, we assist in distributing the remaining assets to heirs or beneficiaries according to the will or California intestacy laws. We then prepare the final accounting and petition the court to close the estate, officially completing the probate process.

Pricing Plan

California law sets attorney fees for probate based on the **gross value of the estate**. These fees are **statutory**, meaning they follow a fixed percentage schedule and are paid **at the conclusion of the probate process**, subject to **court approval**. Here's a breakdown of the standard fee structure:

Estate Value	Statutory Attorney Fee
First \$100,000	4% (\$4,000)
Next \$100,000	3% (\$3,000)
Next \$800,000	2% (\$16,000)
Next \$9,000,000	1%
Next \$15,000,000	0.5%
Above \$25,000,000	Fee determined by the court

For example, an estate valued at **\$1,500,000** would result in a statutory attorney fee of **\$28,000**, which is paid from the estate's assets after court approval. While attorney fees are paid at the end of the probate process, our firm requires an **initial deposit** to cover **out-of-pocket costs**, such as court filing fees (typically around **\$435**), publication fees, and probate referee appraisals. These costs are reimbursed from the estate once funds are available.