



## PROBATE CHECKLIST

0 – 3  
Months

Petition for Grant of letters.  
Need renunciations ?

File Certification of Notice (Rule 10.5)  
This certifies that you sent notice of the estate  
administration to parties involved.

If you pay inheritance tax due  
within 3 months from date of death, you will  
receive a **5% discount**.

Submit Inheritance Tax Return (Rev-1500)  
Two (2) Copies needed - Submit Inventory.

Received Appraisal from the DOR revenue?  
More than estimated? You May owe probate fees.  
Less than estimated? You May be entitled to a refund.

3 – 9  
Months

Pay taxes (if you did not pay them within the  
3 months for discount) Taxes are due within  
9 months from DOD.

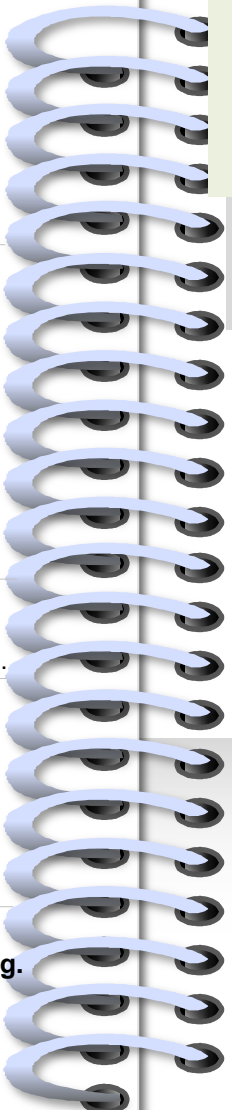
Advertise for 3 consecutive weeks prior to filing  
an Accounting. **It notifies potential creditors.**  
\*\*\*\*OPTIONAL\*\*\*\*

File Petition for final Accounting & distribution.  
**This is done when many debts are outstanding.**  
\*\*\*\*OPTIONAL\*\*\*\*

IF AUDIT – Once Order is signed, you  
may **distribute assets**.

Due  
within 2  
years

Status Report (Rule 10.6) -  
Filed within 2 years or when the estate  
distribution is completed.



### WHEN FILING THE INHERITANCE TAX RETURN (REV-1500), PLEASE PROVIDE:

- 1 **Original** REV-1500 + copy of the will + schedules
- 1 **Copy** REV-1500 + schedules (no will) .
- 1 **Copy** REV-1500 for **your records**.

**The below schedules are the most commonly filed.  
You may not need to file all of them.**

**A** - Real Estate – If the home was  
held solely by Decedent.

**B**- If you have stocks and Bonds

**E** – If there is any Cash, bank  
Accounts held solely by Decedent.

**F** – For Jointly owned Accounts / Property.

**G** – Non Probate –  
For transferred assets (i/e Trusts)

**H** –To claim Expenses  
(i/e - Funeral, probate fees , administration  
of estate or attorney fees).

**I** – To list all valid debt of the decedent.

**J**- Beneficiaries – List names,  
addresses and relationship to  
decedent.

**Additional Inheritance forms, publications and  
information are available @ [www.revenue.state.pa.us](http://www.revenue.state.pa.us)**

**If you have any inheritance tax questions, please  
contact The Department of Revenue @ 717-787-8327**

**To obtain an EIN # dial 800-829-4933 OR go to:  
<https://sa.www4.irs.gov/modiein/individual/index.jsp>**