



PROBATE

Prepared by: 17 TRW/JA

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UNDERSTANDING PROBATE LAW

What is Probate?

Probate is the legal process that occurs after a person's death to validate their will and ensure the proper distribution of their estate. This process involves proving the legality of the will in court, paying off debts and taxes, and distributing the remaining assets to the rightful beneficiaries. Probate generally must be initiated within a specified time frame, often within four years after death, although this can vary by jurisdiction.

Key Aspects of Probate:

- Validation of the Will:
 - The court verifies the authenticity of the will, ensuring it was created by the decedent while of sound mind and free from undue influence.
 - If multiple wills are found, the court determines which is the most recent and valid.
- Appointment of Executor or Administrator:
 - If the decedent named an executor in the will, this person will manage the probate process.
 - If there is no will, the court appoints an administrator to handle the estate.
- Notification of Creditors and Beneficiaries:
 - Creditors are notified and given a set period (usually six months) to file claims against the estate.
 - Beneficiaries are informed of their inheritance and the probate proceedings.
- Payment of Debts and Taxes:
 - All outstanding debts and taxes are paid from the estate's assets before distribution to beneficiaries.
- Distribution of Assets:
 - Remaining assets are distributed to the beneficiaries as specified in the will or, if there is no will, according to state intestacy laws.
- Types of Assets Subject to Probate:
 - Solely owned assets such as real estate, business shares, personal property, bank accounts, and vehicles.
 - Assets that do not have designated beneficiaries or are not held in joint ownership.
- Exemptions from Probate:
 - Jointly owned property and bank accounts with rights of survivorship.
 - Assets with named beneficiaries, such as life insurance policies and retirement accounts.
 - Assets held in a living trust.
 - Assets below a certain value, as specified by state law.

What If There Is No Will?

If the decedent did not leave a will, the estate is considered "intestate." The court will determine the legal heirs based on state intestacy laws. This process may involve:

- A full court procedure called "Determination of Heirship."
- Simpler procedures like an Affidavit of Heirship or a small estates affidavit.
- Appointment of an administrator to manage the estate under court supervision.

Handling Property in Multiple States: If the decedent owned property in more than one state, the probate process can become more complex. Typically, the primary probate proceedings occur in the state where the decedent was a permanent resident. Additional probate processes, known as ancillary probate, may be required in each state where the decedent owned property.

Avoiding Probate:

There are several strategies to minimize or avoid probate, including:

- **Living Trusts:**
 - Transferring assets into a living trust allows them to be distributed without going through probate.
- **Joint Ownership:**
 - Owning property jointly with rights of survivorship ensures that the property automatically passes to the surviving owner.
- **Beneficiary Designations:**
 - Designating beneficiaries on accounts like life insurance, retirement plans, and payable-on-death (POD) accounts bypasses probate.
- **Gifts:**
 - Gifting assets during your lifetime can reduce the size of the estate and avoid probate.
- **Transfer-on-Death (TOD) Designations:**
 - Designating beneficiaries for securities, real estate, and vehicles through TOD registrations can transfer these assets directly to the beneficiaries without probate.

Probate Fees and Duration:

- Probate costs include court fees, administration fees, and legal fees, often based on a percentage of the estate's value.
- The duration of probate can vary widely, from a few months to several years, depending on the estate's complexity and whether the will is contested.

The Role of an Attorney:

While it is possible to handle probate without an attorney, doing so can be complicated and time-consuming, especially during a period of grief. An experienced probate attorney can provide invaluable assistance by:

- Navigating the legal requirements and deadlines.
- Managing paperwork and court filings.
- Advising on tax implications and creditor claims.
- Ensuring the proper distribution of assets.

Understanding probate law and the probate process is crucial for anyone involved in managing an estate. While probate can be a complex and lengthy process, proper planning and legal guidance can help ensure a smoother transition of assets to the rightful beneficiaries. Consider consulting with a probate attorney to navigate this challenging process effectively.

NOTE: This guide is intended for general informational purposes only and does not constitute legal advice. It is advisable to periodically verify this information and consult with a legal professional for the most current and applicable advice. Due to the limited capacity of JAG attorneys, we can only provide basic guidance on probate but cannot assist with the process. We strongly recommend seeking out an attorney who specializes in probate or estate law for more comprehensive assistance. If you have any questions or need to schedule an appointment with a legal assistance attorney, please call the Legal Office at 325-654-3203