INSTRUCTIONS FOR CLOSING A SMALL ESTATE INFORMALLY

These standard instructions are for informational purposes only and do not constitute legal advice about your case. If you choose to represent yourself, you are bound by the same rules and procedures as you would be if you were an attorney.

GENERAL INFORMATION

- Unless prohibited by order of the Court and except for estates being administered in supervised administration the Personal Representative may file to close an estate informally six months after appointment or one year from date of death of the decedent whichever occurs first.
- The estate should have been fully administered including making payment, settlement or other disposition of claims, expenses of administration, taxes, and distribution.
- Closing an estate informally does not result in court approval of the actions of the Personal Representative nor a court discharge. It is merely the statement of the Personal Representative indicating their belief that the administration is completed.
- If no proceedings involving the Personal Representative are pending in the court one year after the closing statement is filed, the appointment of the Personal Representative is terminated. The Registrar takes no further action and no decree is issued.
- For additional information, please review §§15-12-1008 1009, C.R.S.
- If you have a disability and need a reasonable accommodation to access the courts, please contact your local ADA Coordinator. Contact information can be obtained from the following website: http://www.courts.state.co.us/Administration/HR/ADA/Coordinator_List.cfm

COMMON TERMS

is Estate:	All of the property (real or personal) owned by a person on the date of death that subject to probate.	
⊠ Informal:	A proceeding without a hearing by an officer of the court acting as a Probate Registrar.	
☑ Intestate:	Estate in which the Decedent did not leave a Will .	
Interested Persons:	Persons identified by Colorado Law who must be given notice of a court proceeding. This term may include heirs, children, spouse, devisees, beneficiaries, creditors, claimants, and persons having priority to serve as Personal Representative, depending on the circumstances.	
 Letters: Representative. 	A document issued by the court, identifying the authority of a Personal	
Personal Representative:	A person at least 21, resident or non-resident of Colorado, who has been appointed to administer the estate of the Decedent; previously referred to as Executer/Executrix.	
Small Estate:Testate:	Estate with a value, less liens and encumbrances, that is not more than \$60,000.00 Estate in which the Decedent left a Will.	

If you do not understand this information, please contact an attorney.

\$20.00

FEES

No filing fee is required. Other fees that a party to the case may encounter are:

- Certification of Orders and Letters
 - Copy of Documents \$.75 per page

FORMS

To access a form online go to <u>www.courts.state.co.us</u> and **click on the "Forms**" tab. The packet/forms are available in PDF or WORD by selecting **Probate (Decedent's Estate – Closing a Small Estate Informally).** Complete the forms online or print them and type or print legibly in black ink.

- JDF 966 Statement of Personal Representative Closing Small Estate
- JDF 941 Decedent's Estate Inventory
- □ JDF 942 Interim/Final Accounting

STEPS TO CLOSING THE ESTATE

Step 1: Ensure that the following documents have been completed.

- 1. Information of Appointment JDF 940. You may have already completed this document with the Court, as it must be completed within 30 days from appointment. This document must be on file with the Court.
- 2. Decedent's Estate Inventory JDF 941 and Interim/Final Accounting JDF 942 are not required to be filed with the Court.
- Copies of the completed Decedent's Estate Inventory MUST be sent to all Interested Persons who request it. In addition, if there are unknown intestate heirs or unknown devisees, a copy of the Decedent's Estate Inventory - JDF 941 MUST be sent to the Attorney General pursuant to §15-12-706(3), C.R.S.

Step 2: Complete Forms.

Selecting these instructions indicates that you plan to informally close administration of a small estate. The caption below must be completed on all forms filed. Be sure to make a copy for your own records of all forms you file with the Court.

District Court Denver Proba	ate Court County, Colorado		
Court Address:			
In the Metter of the Fotote of			
In the Matter of the Estate of:		▲ COURT USE ONLY ▲	
Deceased			
Attorney or Party Without Attorney (Name and Address):		Case Number:	
Phone Number:	Email:		
FAX Number:	Atty. Reg. #:		
		Division: Courtroom:	
NAME OF FORM			

Given Statement of Personal Representative Closing Administration (JDF 966).

- □ This form can be completed by the Personal Representative or Successor Personal Representative.
- Complete **all** sections on the form.

Step 3: File your Papers with the Court:

- Provide the Court with the completed Statement, as described in **Step 2** above.
- □ Complete the Certificate of Service portion on JDF 966 listing the names and addresses of all interested persons to whom the Statement was sent and the date sent.

Step 4: The Estate is deemed closed one year after filing the Statement.