



Mundy Legal Services, PLLC

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Thank you for retaining Mundy Legal Services to represent you in this probate matter. There are many steps to the probate of a will, but fortunately in hiring our office and working together it will not be a difficult process. Within the next two weeks please be sure that the following have been provided to our offices:

- Signed Mundy Legal Services, PLLC Legal Service Agreement
- Payment on retainer
- The original Will
- Probate Information Sheet
- Death Certificate

While each estate is different and may require additional steps based upon individual needs, there are several things that must happen. An Application to Probate will be prepared and filed by my office with the Court and the original will shall be sent to the Clerk for their review and acceptance. After the acceptance and posting, our office will contact you and coordinate a hearing date for you to appear with me before the Court and be approved as the Executor of the Estate.

During this hearing you will sign an Oath of Executor vowing to execute the wishes of the Deceased and Letters Testamentary will be authorized for your use. These Letters are the word of the Court confirming that you manage the Estate.

In the meantime while we are handling the Application and the hearing, there are things you can do to help the process and protect the Estate of the Deceased:

- Begin gathering the following:
 - mailing address(es) of any and all beneficiaries named in the will.
 - all documents showing the property of the estate **and the valuation of each item** at the time of Decedents passing- this includes but isn't limited to deeds, valuables, motor vehicle titles, bank statements, etc.
 - any documents showing any debts owed by the Deceased like mortgages, medical bills and other outstanding matters.
- When preparing the obituary, don't include details such as address or day and month of birth (use only the year) of the decedent.

- Mail copies of the death certificate to all three credit-reporting bureaus – Equifax, Experian and TransUnion – and all credit issuers to cancel accounts right after the person dies. A few weeks after taking these measures, run a credit report on the dead to ensure there's no suspicious activity. You can get a free report from each bureau at www.annualcreditreport.com.
- Contact your state department of motor vehicles to cancel any driver's license and prevent duplicates from being issued.

Sincerely,

Allison Mundy
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AM/ea
enclosure(s)