

STATE OF INDIANA)
) SS:
COUNTY OF JOHNSON)

IN THE JOHNSON _____ COURT
CASE NO. 41 ____ - ____ - ____ - ____

IN RE:
THE ESTATE OF:
_____, DECEASED.

INSTRUCTIONS
TO THE PERSONAL REPRESENTATIVE
OF AN UNSUPERVISED ESTATE

You have been appointed by this Court as Personal Representative of this estate. It is important that you fully realize your duties and responsibilities. *Please read carefully, date and sign one copy of this form and submit it to the Court. Keep one copy for your records.* Listed below are some of these duties but not all of them.

As Personal Representative, you are required by Indiana law to:

1. Locate, collect, and maintain all property owned by the Decedent. Keep motor vehicles and real estate insured and protected.
2. Prepare an inventory describing all property belonging to the estate, with date of death values, not later than two (2) months after your appointment, and file a certification with the Court that is prepared and available to heirs and distributees.
3. Open a separate checking account in your name "as Personal Representative for the Estate of (name of the Decedent): and NEVER CO-MINGLE your funds or anyone else's funds with this account. Always make estate expenditures by check and retain the canceled checks. Make sure that the bank is willing to return canceled checks to you. Obtain a federal I.D. number for the checking account. Do not use your Social Security number or the Decedent's Social Security number.
4. Ascertain all debts that the Decedent owed. Look through Decedent's tax returns and other papers. Talk to anyone who knew Decedent's business. Consult your attorney as to payment of debts, costs of administration, bond premiums, and funeral bills. Some debts may be unenforceable. Some may have priority over others. DO NOT MAKE any distribution to an heir or devisee without prior consent from your attorney. Always obtain receipts for all distributions made. NEVER borrow estate property or put it to your own personal use.
5. Immediately fill out a change of address at the post office to have the Decedent's mail forwarded to you.
6. Prepare and file income tax returns for the tax year in which the Decedent died and any returns for prior years if needed. Timely prepare and file any estate, inheritance, or fiduciary tax returns and pay taxes as they come due.

7. After you fully complete the estate administration, you must file a closing statement with the Court verifying that all proper claims, expenses & taxes have been paid, all assets have been properly distributed, and a copy of the closing statement has been sent to all distributees. In addition, you must furnish a written statement to all distributees fully accounting for all assets, expenses and distributions made to the heirs.
8. Notify the Court and your attorney of any change in your address or telephone number.
9. Keep a record of the time you spend working on the estate. You are entitled to a reasonable fee, unless you waive a fee.
10. Always contact your attorney for advice if you are unsure as to any act as Personal Representative. Have your attorney counsel you in relation to the estate and explain anything that you do not fully understand.

You, as Personal Representative, are ultimately responsible to see that the estate is properly and promptly administered, and you are personally liable for incorrect distribution, payments, or acts, as well as any unpaid taxes or costs of administration.

I acknowledge that I have carefully and completely read the above instructions and received a copy for my records. I agree to properly carry out my duties.

Dated this _____ day of _____, 20____.

Signature, Personal Representative

Signature, Personal Representative

Print, Personal Representative

Print, Personal Representative