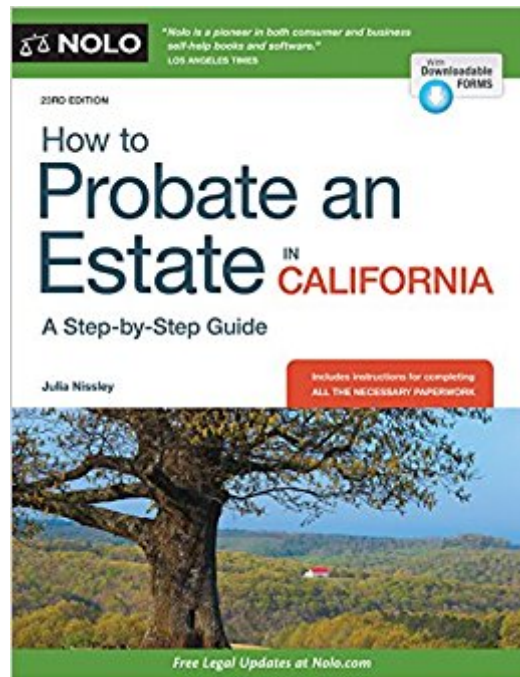




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# How To Probate An Estate In California



## Synopsis

Handle probate yourself and save time and money When you've lost a loved one, the inevitable legal matters can seem difficult and confusing. But in most cases, probate involves little more than routine paperwork to transfer assets to family members and other beneficiaries. How to Probate an Estate in California explains, step-by-step, how to wrap up a basic estate. Whether you do it yourself or work with a lawyer, you'll save money and time. Find out how to: read and understand a will or trust determine who inherits if there is no will pay bills and taxes complete and file all necessary court paperwork collect life insurance and other death benefits transfer real estate, securities, vehicles, and other assets to heirs and beneficiaries transfer some assets without probate The completely updated 23rd edition provides the latest laws, tax information, forms, and court procedures. Check out Nolo's products created just for California residents.

## Book Information

Series: How to Probate An Estate in California

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## Customer Reviews

This book provides all of the forms, instructions, guidance, and tips you'll need to probate a simple estate in California. And even if you hire a lawyer to help, this book will show you how to do much of the work yourself.

Julia Nissley was Probate Administrator with the Los Angeles law firm of Silverberg, Rosen, Leon and Behr for many years. She is an honors graduate of the Attorney Assistant Training Program in

Probate Administration at the University of California--Los Angeles School of Law, and a member of the California Association of Legal Document Assistants. Julia is a native Californian and enjoys playing tennis and riding trains with her husband, Ron. The author of *How to Probate an Estate in California*, Julia now operates her own form preparation service under the name Probate Direct, assisting consumers with all kinds of probate paperwork through the mail or in person.

With my father's death, I thought putting his financial issues to rest would be simple as I had handled his income, etc for many years. However some oil royalty interests he left to me required Probate before an ownership change would be allowed. I was unprepared for the court documents (many of which are very confusing to understand). Being a layperson had nothing to do with the issues, as when I began to read the Probate Notes posted by the court, I discovered that attorneys often used the incorrect document or didn't submit the required document at all. While the court clerks often tried to be helpful, they are limited in what they can tell you, which caused frustration, because I wasn't asking for legal advice, simply a form number or if a form was available. This book has been a massive time saver. Many thanks to the author.

Published in March 2016, but the forms are incorrect as a result of updates published by the Judicial Council in January. So, many form references are incorrect, creating confusion. It is puzzling to me that the publisher would go forward with a release in March of 2016, when the proposed changes were already under public review and under consideration for adoption effective January 1, 2017. Additionally, the book spends a LOT of time with examples around filing when a will is present, and does not give nearly enough attention to those probate situations where there is no will. This, understandably, is a more complex subject but this is exactly why it needs more attention than the will based filings.

I purchased the 6th edition (while working for Dept. of Finance) many, many years ago to do the paperwork for individuals who wanted his/her assets given to the State of California. I found the older 6th edition to be very helpful. So I purchased this 23rd edition to do the paperwork for my parent's simple estate. This book covers the major steps required to settle a simple estate in California. The author wrote this book in plain English. When technical words or phrases are used, author defines them. Also, I especially like the explanations on what information to put on each line of the many forms, the sample letters that an executor may need to send, and the flow charts. In California, the law does not require an attorney to settle an estate. I believe with the book's

guidance, most individuals can successfully settle a simple estate.

Very clearly written and covers each step. I still needed an attorney but this reference offers me great guidance for staying on track.

Useful. Exactly as expected. Update of an earlier reference version. Prompt ship. Great condition until I start making notes in it!

Has been very helpful so far. Very instructive and easy to follow.

Currently using this text. Very user friendly. So far so good!!

This book is very helpful.

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