

# FLOWCHART FOR PROBATE /ADMINISTRATION

Action to be taken by Client

Action to be taken by Solicitor

Client arranges appointment to see solicitor at a mutually convenient time and attends office to provide details of their wishes. Financial advisors input sought where required

Solicitor advertises indeed application to determine either the location of a current or if the one available is the latest.

Client prepares list of assets and liabilities of deceased person and list of names and contact details for beneficiaries to best of his/her knowledge.

Solicitor undertakes investigations to identify assets and liabilities based on clients knowledge and general Probate practices. Solicitor prepares applications and affidavits for clients approval.

Client attends office to sign documentation.

Signed original affidavit and application for Grant are lodged with Supreme Court NSW Probate Division for inspection and approved and making of Grant and issuing Order of the Court. Solicitor advises of Grant or Courts refusal.

Client with solicitors assistance collects all assets of the estate and prepares appropriate distribution/transfer documentation to pay beneficiaries as required by the Grant of Probate/Administration.