



# Timeline of the California Probate Process

*A Brief Overview for Huber Law Group Probate Clients*

## What is Probate?

- Probate is a court-supervised process to transfer assets when a decedent dies without an estate plan or with a will-based estate plan.
- The court appoints a Personal Representative (executor or administrator) to gather estate information, communicate with heirs/beneficiaries, manage estate assets, pay debts and taxes, and ultimately distribute the assets with court approval.
- Deadlines and waiting periods are built into California law, so most probate matters take 9-18 months to complete.

## At-a-Glance Timeline (Typical 9-18 Months)

### 1. Death Occurs (Week 0)

Probate is often required when a person passes away without an estate plan or with a will-based estate plan

### 2. Locate the Will & Estate Documents (Weeks 1-2)

The original will (if one exists) must be located and reviewed to determine next steps.

### 3. File Petition for Probate (Weeks 2-6)

A formal request is filed with the court to open the probate case and appoint a personal representative.

### 4. Court Appoints Personal Representative (Weeks 6-10)

The court issues “Letters Testamentary” or “Letters of Administration”, giving the personal representative legal authority to act.



**5. Notice to Heirs & Creditors (Months 2–4)**

Heirs, beneficiaries, and known creditors are notified. A creditor claim period begins.

**6. Inventory & Appraisal (Months 3–6)**

All probate assets are identified and valued, often with help from a court-appointed probate referee.

**7. Pay Debts, Expenses & Taxes (Months 4–9)**

Valid creditor claims, final bills, and required taxes are paid from estate funds.

**8. Court Approval (If Required) (Months 9–12)**

Some estates require court approval before assets can be sold or distributed.

**9. Distribute Assets (Months 9–15)**

Remaining assets are distributed to beneficiaries according to the will or California law.

**10. File Final Accounting (Months 12–18)**

A detailed report is submitted showing all estate activity.

**11. Probate Closed (Around Months 9–18)**

Once approved, the court closes the estate and the personal representative's duties end.

## **Common Reasons Probate Takes Longer**

- Real estate must be sold
- Creditor claims or tax issues
- Missing documents or asset information
- Family disputes or objections
- Court scheduling delays



## **How Huber Law Group Helps**

- Prepares and files all probate court documents
- Tracks deadlines and notice requirements
- Helps personal representative avoid mistakes and liability
- Guides asset valuation and compliance
- Advises on distributions and court approvals
- Works to keep the process moving

## **Questions? Contact Huber Law Group**

Serving as a personal representative can feel overwhelming, especially when you are also grieving a loss. California probate law imposes strict duties, deadlines, and reporting requirements, and mistakes can result in personal liability.

Huber Law Group's role is to guide you through each step so you can fulfill your responsibilities with confidence. Our goal is to reduce stress, avoid costly missteps, and help you close the probate as smoothly and efficiently as possible.

Contact Huber Law Group Today to schedule a no-cost initial consultation.