

## PROBATE FORMS LIST

The Massachusetts Probate Volume includes more than 130 automated forms used for probate or administration of an estate, including the official Probate and Family Court forms for administration, probate, small estates and accounting. It also includes additional forms relating to the inventory of property, the disposition of estate assets and forms dealing with fiduciary bonds and compensation.

### CLIENT MATTERS AND GENERAL CORRESPONDENCE

Client Information Form  
Letter to Client - Transmittal  
Letter to Interested Party - Transmittal  
Letter to Interested Party - Opening of Probate and Notice  
Letter to Interested Party - Notice of Disclaimer Rights  
Letter to Bank to Requesting Account Balances  
Letter to Broker to Verify Balances and Values  
Letter to Creditor to Verify Account Balance  
Letter to Creditor of Defective Claim  
Letter to IRS to Verify Prior Gift Tax Returns  
Letter to Public Administrator re Initiation of Administration  
Letter to Request Death Record  
Application for Copy of Death Record - Dept of Health and Human Services  
Letter to Attorney General

### PROBATE OF WILL

#### TESTATE PROCEEDINGS

Petition for Delivery of Will to Probate Register  
Probate of Will (CJ-P 2)  
Allowance of Foreign Will (CJ-P 6)  
Voluntary Executor - Executrix Statement (CJ-P7A)  
Affidavit of Witness to Will (AC 61)  
Citation - Probate of Will  
Affidavit of Notice to Devisees and Legatees (CJ-P 14B)  
Motion - Appointment of Temporary Executor  
Decree - Motion for Appointment of Temporary Executor  
Affidavit of Solvency of Estate - Temporary Executor  
Petition to Take Deposition of Witness to Will (AC 59)  
Deposition of Witness to Will (AC 60)  
Notice of Deposition  
Declination (AC 71)  
Petition for Probate of a Lost Will

#### WILL CONTROVERSY

Notice of Appearance  
Affidavit of Objections to Will  
Petition for Compromise of Controversy over Will (AC 64)  
Compromise of Controversy over Will - Decree (AC 65)  
Motion - Declaration of Rights to Real Estate Devised by Will  
Decree - Declaration of Rights to Real Estate Devised by Will

#### ADMINISTRATION WITH WILL ANNEXED

Administration with Will Annexed (CJ-P 3)  
Administration De Bonis Non with Will Annexed (CJ-P 4)  
Motion - Appointment of Temporary Administrator with Will Annexed  
Decree - Motion for Appointment of Temp Administrator with Will Annexed  
Affidavit of Solvency of Estate - Temporary Administrator with Will Annexed

### INTESTATE ADMINISTRATION

#### INTESTATE PROCEEDINGS

Petition for Administration (CJ-P 1)  
Petition for Administration De Bonis Non (CJ-P 5)  
Voluntary Administration Statement (CJ-P7)  
Public Administration (CJ-P 9)  
Citation - Petition for Administration  
Petition for Distribution - Intestate Estate (AC 50)

#### SPECIAL ADMINISTRATION

Special Administration (CJ-P 8)  
Petition for Leave to Pay Debts by Special Administrator (AC 56)  
Petition of Special Administrator to Sell Personal Property  
Decree - Special Administrator to Sell Personal Property

### ADDITIONAL COURT FILINGS

#### BONDS

Fiduciary Bond [CJ-P 26]  
Petition for Discharge of Surety on Bond (AC 32)  
Petition for Leave to Bring Suit on Fiduciary Bond (AC 33)  
Petition for Reduction of Bond (AC 144)  
Petition for New Bond (AC 31)

#### MANAGEMENT OF ESTATE

Appearance (CJ-P 126)  
Citation - Notice (CJ-P 14)  
Appointment of Agent (CJ-P 17)  
General Assent and Release of All Demands and Assent to Account (CJ-P 21)  
Affidavit (CJ-P 151)  
Military Affidavit (CJ-P 148)  
Appointment of Attorney - Military (AC 155)  
Notice of Withdrawal of Attorney Appearance  
Petition - General (AC 116)  
Petition for Discovery (AC 69)  
Appointment and Report of Guardian Ad Litem  
Certificate of Services - Guardian Ad Litem  
Motion to Waive Appointment of Guardian Ad Litem  
Decree - Waiver of Appointment of Guardian Ad Litem  
Resignation of Fiduciary (AC 74)  
Motion - General (CJ-D 400)  
Complaint - Contempt for Failure to Render Account (CJ-D 103)

#### SPOUSAL RIGHTS

Waiver of Will (CJ-P 66)  
Assignment of Dower (AC 103)  
Petition for Surviving Spouse's Allowance (AC 70)

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**MISCELLANEOUS FILINGS**

Petition for Removal of Fiduciary (AC 73)  
 Uniform Counsel Certification Form  
 Affidavit of Domicile - Estate  
 Return of Service - General  
 Notice of Limited Appearance  
 Notice of Withdrawal of Limited Appearance

**ASSETS AND LIABILITIES OF ESTATE****INVENTORY AND APPRAISAL**

Inventory (CJ-P 41)  
 Determination of Value (AC 106)  
 Petition and Order to Render Inventory - Account (CJ-P 68)  
 Petition for Revocation of Warrant for Appraisal & New Warrant (AC 37)  
 Submission Agreement by Children - Division of Estate  
 Affidavit of Correction of Real Estate in Inventory  
 Affidavit of Omission of Real Estate from Inventory

**PROPERTY****REAL PROPERTY**

Petition for Sale - Real Estate Debts, Legacies, Charges (CJ-P 75)  
 Petition for Sale - Real Estate (CJ-P 76)  
 Sale - Real Estate (CJ-P 143)  
 Petition for Sale - Real Estate - Guardian Ad Litem - Maintenance (AC 78)  
 Petition for Sale - Real Estate - Guardian Ad Litem - Investment (AC 79)  
 Petition for Partition and Sale - Real Estate (AC 92)  
 Partition - Sale - Real Estate - Citation (AC 93)  
 Partition - Sale - Real Est - Affid Filing Notice in Regis of Deeds (AC 95)  
 Partition - Sale - Real Estate - Appointment to Represent Party (AC 96)  
 Petition for Mortgage - Real Estate (AC 88)  
 Petition for Mortgage - Real Estate - Guardian Ad Litem (AC 89)  
 Petition for Lease - Real Estate - Guardian Ad Litem (AC 91)  
 Affidavit of Notice of Sale by Publication (AC 98)  
 Assent and Release - Sale of Property  
 Deed by Executor - Administrator - Other Fiduciary  
 Receipt of Property

**PERSONAL PROPERTY**

Sale - Personal Estate (AC 84)  
 Sale - Receipt of Personal Estate by Foreign Fiduciary (AC 85)

**MISCELLANEOUS PROPERTY**

Petition for Leave to Carry on Business (AC 57)  
 Disclaimer of Interest in Property  
 MA Resident Estate Tax Return (M-706)  
 Application for Extension of Time to File MA Estate Return (M-4768)  
 MA Nonresident Decedent Affidavit (M-NRA)  
 Application for Certificate Releasing MA Estate Tax Lien (M-4422)  
 Certificate Releasing MA Estate Tax Lien (M-792)  
 Affidavit Regarding Necessity of Federal Estate Tax Filing

**CLAIMS AGAINST THE ESTATE**

Notice of Claim (AC 102)  
 Representation of Insolvency - Petition for Appointment of Commiss (AC 42)  
 Representation of Insolvency - Petition for Exam of Claims by Court (AC 46)  
 Claim (AC 46A)  
 Order to Admin - Exec of Insolvent Est to Notify Cred - Present Claim (AC 47)  
 Insolvency - List of Claims (AC 48)  
 Warrant to Commissioners and Report (AC 43)

**PAYMENT BY ESTATE**

Petition for Distribution - Legacies (AC 53)  
 Petition for Leave to Deposit Funds for Benefit of Minor (AC 54)  
 Petition for Payment of Funds Deposited for Benefit of Minor (AC 55)

**ACCOUNTS AND COMPENSATION****ACCOUNTS**

Account Schedules A - C

Account (CJ-P 30)  
 Guardian Ad Litem - Account (AC 120)  
 Notice of Fiduciary's Account (CJ-P 39)  
 Motion for Citation to be Issued on Account  
 Objection to Account  
 Motion to Strike Objection - Appearance to Account  
 Judgment to Allow Account (CJ-P 38)

**COMPENSATION AND FEES**

Petition for Counsel Fees (AC 141)  
 Determination Regarding Fees and Cost  
 Statement of Payment (CJ-P 128)