

PROBATE & INHERITED PROPERTY IN PENNSYLVANIA

Probate Document Checklist

Stay Organized. Keep Probate on Track.

Probate is a paperwork-heavy process — and the lender doesn't wait for it to finish. **Missing one document can stall the case or allow foreclosure to restart.** Use this checklist to stay on top of what matters.

MUST-HAVE DOCUMENTS

1. Court Filings

- Petition for Probate** — filed with the Register of Wills in your county
- Letters of Administration** or Letters Testamentary — issued by the court
- Inventory of Estate Assets** — required filing within 9 months in Pennsylvania
- Notices to Heirs and Beneficiaries** — required by the court
- All **court orders and motions** filed during the probate process

2. Death & Ownership Records

- Certified death certificate** — order multiple certified copies
- Will** — original, if one exists; filed with the Register of Wills
- Property deed and title documents** confirming ownership at time of death

3. Mortgage & Foreclosure Notices

- Current **mortgage statements** — balance, payment status, and arrears
- Any **lender correspondence** received after probate was opened
- Original **Complaint in Mortgage Foreclosure** filing — retain for reference
- Any **sheriff sale scheduling notices** from the county

4. Financial & Property Records

- Property tax bills** — current year and any outstanding balance
- Homeowner's insurance policy** — confirm coverage is active and premiums paid
- Utility bills** — water, gas, electric; confirm accounts are current
- Maintenance and repair receipts** for any work done to preserve the property
- Any **municipal liens or code violation notices** on the property

5. Attorney & Executor Records

- Retainer agreement** with probate attorney and proof of payment
- All **attorney correspondence and court filings** submitted on behalf of the estate
- Executor accounting** — all expenses paid from the estate, itemized
- Contact info for the **Register of Wills** in your county — for filing verification

PRO TIPS

- 1 Keep originals safe, copies in one folder** — courts and lenders require originals for key filings. Never send an original without keeping a certified copy.
- 2 Save all mortgage and court notices** — nothing from the lender or court is junk mail during probate. A Motion for Relief from Stay can arrive in a plain envelope.
- 3 Update the inventory monthly** — estate assets and expenses change. Staying current avoids filing errors that can stall or reopen the case.
- 4 The property can be sold during probate** — court approval is required, but selling before probate closes converts equity to cash, divides it fairly among heirs, and often speeds up the entire process.

Questions about the probate process?

Free, confidential, and no obligation. A 15-minute call can help protect the estate's equity.

Reply "YES" or call/text (717) 356-3551 · innov8tiverealestate.com