

Bruce Sawyer of Bruce D. Sawyer Attorney at Law CPA Shares Probate Checklist Guidance in HelloNation

What steps should be taken before the probate process begins to ensure efficient estate administration?

CUMBERLAND, RI, UNITED STATES, July 21, 2025 /EINPresswire.com/ -- What steps should be taken before the probate process begins to ensure efficient estate administration? In an article featured in [HelloNation](#), Attorney Bruce Sawyer of Bruce D. Sawyer Attorney at Law CPA in Cumberland, Rhode Island, outlines a practical probate checklist that helps executors prepare effectively before initiating formal proceedings. By addressing certain legal and administrative tasks early, families can reduce the risk of delays and complications as the estate moves through probate court.



Bruce Sawyer

Attorney Sawyer explains that the first responsibility for an executor is securing multiple original certified copies of the death certificate, which are necessary for communicating with financial institutions, insurance companies, and government agencies. These official documents are required to verify death and gain access to the decedent's accounts or records. Without them, even routine matters can stall.

Equally important is locating the original will. The probate court cannot move forward until the will is validated, and in its absence, the estate may be divided under intestacy laws, potentially against the decedent's wishes. Executors are encouraged to check safe deposit boxes, attorney records, and personal files to locate the signed document. After that, they must prepare a full inventory of the estate, including real estate, financial accounts, debts, and personal property. A clear and organized inventory not only helps with court filings but also prevents future disputes among heirs.



Filing a petition for probate with the appropriate court initiates the process and must be handled with care"

Bruce Sawyer

Filing the probate petition correctly is another key step. Mistakes at this stage may trigger legal penalties, extend the timeline, or increase costs. According to Attorney Sawyer, enlisting a qualified probate attorney provides necessary guidance and reduces the likelihood of procedural errors. In [A Simple Checklist Before Probate Begins](#), he stresses that careful early action is essential to

honoring the decedent's wishes while managing obligations to the court, creditors, and beneficiaries.

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Blair Elizabeth

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info@hellonation.com

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