



## Estate Administration Process

### *Instructions for Opening an Estate*

1. Determine the value of the estate.
  - a. Make a list of anything that belonged only to the person that who died, and then list the value of each item.
  - b. If there is a house, you can find the value at Maryland State Department of Assessment and Taxation Real Property Search - <https://sdat.dat.maryland.gov/RealProperty/Pages/default.aspx>.
  - c. If there is a vehicle, you can use Kelley Blue Book - <https://www.kbb.com/>.
  - d. If the person who died owed money on the things you listed, list how much was owed.
  - e. Subtract what is still owed from the value of all the things listed and that will be value of the estate
2. If the value is less than \$50,000 you will need to file a small estate.
3. If the value is more than \$50,000 (or \$100,000 if you are the surviving spouse), then you need to file a regular estate.
4. You can find all Maryland Register of Wills estate forms at <http://registers.maryland.gov/main/forms.html>, or at the Register of Wills office.
5. You will file the forms in the county where the deceased person lived.
6. When you file the forms, you will also need to bring:
  - a. the will (if there is one)
  - b. the death certificate
  - c. the funeral bill
  - d. a list of interested persons
  - e. a list of all assets identified above
  - f. car titles (if there are any)
  - g. the home property value (if there is one)
  - h. information report
  - i. filing fees, and
  - j. other small forms

7. Filing fees can be found here - <http://registers.maryland.gov/main/fees.html>.
8. When the estate is opened, the Register will give you a list of anything you still need to do and the deadlines for doing those things. Pay attention to those deadlines!
9. The Personal Representative will have to obtain a bond. The local Registers office can provide suggestions on where to get a bond.
10. A small estate must remain open for at least six months.
11. Once the estate is closed, the belongings from the estate can be distributed.
12. If there is a house, a new deed will have to be prepared and filed with Land Records.
  - a. Once you have closed the estate, contact MVLS to obtain assistance with filing a new deed.

If you have to open a regular estate, there are a few more steps

13. You have to file an Inventory that lists all assets in the estate.
14. You also have to file an “Account” within nine months of being named Personal Representative. An account must include:
  - a. the beginning value of the estate
  - b. change in asset value since death
  - c. income to the estate after death
  - d. distribution of assets
  - e. taxes paid
  - f. amount remaining to be distributed if distribution is not finished.
15. A regular estate must remain open for at least 9 months, and can’t be closed until the Accounting has been filed and accepted.
16. More information can be found in the Register of Wills Estate Administration Booklet - <http://registers.maryland.gov/main/publications/AdministrationBooklet2017.pdf>.
17. If there is a house, a new deed will have to be prepared and filed with Land Records.
  - a. Once you have closed the estate, contact MVLS to obtain assistance with filing a new deed.