



FORM	WHAT IT IS AND WHAT IT DOES	WHEN YOU FILE IT	WHAT MUST COME FIRST
PHASE 1 • STARTING THE CASE			
DE-111	Petition for Probate. Opens the case, asks the court to appoint you, and requests full or limited IAEA authority.	Day one. Filing sets your case number and hearing date.	None. Attach the original will and a certified death certificate.
DE-142 / DE-111(A-3e)	Waiver of Bond by Heir or Beneficiary. Each person entitled to a share signs their own copy.	Filed with the DE-111.	Only if the will does not waive bond, or there is no will.
L-0758 (OC local)	Declaration in Support of Bond Waiver. Tells the court why the waiver should be accepted.	Filed with the DE-111 and the waivers.	A signed DE-142 from every eligible heir or beneficiary.
DE-121 + Remote Hearing Attachment	Notice of Petition to Administer Estate. Notifies heirs, beneficiaries and creditors that a petition was filed.	Served and published after filing; on file before the hearing.	DE-111 filed. You need the case number and hearing date first.
L-1116 (OC local)	Court-approved newspaper list. The DE-121 must publish in one of these, not any paper you pick.	Arrange publication once the hearing date is set.	A completed DE-121.
Proof of Service + Proof of Publication	Proves everyone required was served and that notice ran in an approved newspaper.	Filed before the hearing.	DE-121 served and published. Someone else must mail it, not you.
PHASE 2 • GETTING APPOINTED			
DE-140	Order for Probate. The signed order appointing you and naming the probate referee.	Submitted at or right after the hearing.	Petition granted, and bond posted if required.
DE-150	Letters. Your proof of authority. Banks, title and the assessor all want certified copies.	Submitted with the DE-140; order copies once it reads FILED.	A signed DE-140.
DE-147	Duties and Liabilities of Personal Representative. Your signed acknowledgement of the job.	Filed with the DE-140 and DE-150.	Appointment granted.
DE-147S	Confidential Statement of Birth Date and Driver's License Number.	Filed with the DE-147.	DE-147.
L-1450 (OC local)	Agreement to Appear and Comply. Orange County's own undertaking by the Personal Representative.	Filed with DE-140, DE-150, DE-147 and DE-147S.	Appointment granted.
PHASE 3 • ADMINISTERING THE ESTATE			
L-0042 (OC local)	Application and Order Appointing Probate Referee. Needed only if no referee was named on your DE-140.	Before you can finish the Inventory & Appraisal.	Real property in the estate and no referee designated.
DE-160/GC-040 + DE-161/GC-041	Inventory and Appraisal with attachments. You value cash on Attachment 1; the referee values real estate on Attachment 2.	Due within 4 months of Letters issuing.	Letters issued and a probate referee assigned.
Assessor forms (county, not court)	Change in Ownership Statement, Preliminary Change of Ownership Report, and a Reassessment Exclusion claim for parent-child transfers.	Soon after appointment; the exclusion claim has its own deadline.	Real property in the estate. Filed with the OC Assessor.
DE-157	Notice of Administration to Creditors. Starts the creditor claim clock.	Within 4 months of Letters issuing.	Letters issued.
DE-172	Creditor's Claim. Served blank with the DE-157. You also use it to seek reimbursement for estate debts you paid personally.	Served with the DE-157; creditors file it with the court.	DE-157.
DE-174	Allowance or Rejection of Creditor's Claim. Your written decision on each claim.	Within 30 days of each claim being filed.	A DE-172 filed against the estate.
DE-165 / DE-166	Notice of Proposed Action and its waiver. How you sell the house without a hearing.	At least 15 days before the action takes effect.	Full IAEA authority. Limited authority needs court confirmation.
PHASE 4 • CLOSING THE ESTATE			
Petition for Final Distribution + Final Accounting	Reports every dollar in and out and asks the court to approve who gets what. A Status Report can be filed instead.	Within 1 year of Letters. Missing this is why most estates stall.	Inventory on file and the creditor claim period closed.
DE-120	Notice of Hearing (Decedent's Estate). Notifies interested persons of the closing hearing.	Served and filed with a Proof of Service before the hearing.	The closing petition must be filed first.
Receipts from distributees	A signed receipt from every beneficiary confirming they received their share.	After you distribute, before you ask to be discharged.	A granted order and assets actually distributed.
DE-295 / GC-395	Ex Parte Petition for Final Discharge and Order. Closes the case and releases you.	The last filing. You are not done until this is signed.	All receipts on file.