



PROBATE & ESTATE ADMINISTRATION ASSESSMENT

www.jordanlawfirmpllc.com

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We are here to help.



Hello--I am Sarah Jordan, owner of Jordan Law Firm pllc and the attorney on staff. I am glad you reached out. In the midst of losing someone, it can be daunting to think about administering their estate. We are here to help.

This guide details our process for learning about the circumstances of the estate. My hope is that our probate and estate administration assessment process helps you to feel supported, and maybe even comforted that a clear, organized path exists to help you move forward.

If you have any questions or concerns, please get in touch with me or my team. I look forward to speaking with you.

Sincerely,

Sarah Jordan



What is Probate & Estate Administration?

When someone dies, their legal affairs must be wrapped up. In a general sense, the process of wrapping up a deceased person's legal affairs is called "administering their estate." There are different methods used to administer an estate, depending on the circumstances. Common methods include probate, formal estate administration, informal estate administration, trust administration, and the small estate affidavit procedure--all of which are explained in more detail on the next page.

In any event, administering an estate involves understanding and paying the decedent's debts out of estate assets, filing necessary tax returns, gathering the decedent's assets, and distributing the remaining assets according to a will, trust, beneficiary designations, or under the Washington intestate laws.

In order to know which type of estate administration is necessary, we perform our Probate & Estate Administration Assessment. Such an assessment must be done in all cases, no matter if you use an attorney or not, and regardless of which attorney you may choose. Our process is designed to be as efficient and cost effective as possible.

01

Probate

Needed when a decedent has titled assets in their name or if letters testamentary are needed for other reasons, and the decedent had a valid will.

02

Formal Estate Administration

Needed when a decedent has titled assets in their name or if letters of administration [similar to letters testamentary] are needed for other reasons, and the decedent did not have a valid will.

03

Informal Estate Administration

Possible when the decedent had no titled assets in their name and does not need letters testamentary; a decedent may or may not have a will.

04

Trust Administration

Used when a person has a revocable living trust or other trust; can be used in conjunction with the other options listed above.

05

Small Estate Affidavit

Used when letters testamentary/ administration are not needed, and third parties will accept an affidavit to release assets.



The Assessment

At the start of any estate administration process, it is important to assess the circumstances of the estate so that we know what the next steps will be.

First, our attorney will connect with you on the phone, by Zoom, or in person to touch base about any estate documents of which you are aware and any questions you have. We will try to determine whether there could be other documents pertaining to the estate, such as codicils, trusts and amendments, deeds, community property agreements, business documents, and more. We will instruct you where to look for these documents and can help you search the public record.

The attorney will review all available documents for authenticity, complications such as missing or incorrect dates and name spellings, referenced but missing documents, disinherited heirs, etc. We provide a written assessment letter of the findings and a detailed recommendation on your next steps. If Jordan Law Firm handles the type of estate at issue, we will offer to be the attorney for the estate going forward and detail the process and costs. If we cannot handle your estate, we will make a personal introduction for you to another attorney who likely will be able to help.

In addition, you'll get a tabbed file box to help you stay organized with the estate, a complete copy of all pertinent documents, and an estate administration checklist.

Details



Complete in:
1-2 weeks



Cost:
\$650.00



Up to 3 meetings
with attorney and
unlimited calls with
legal assistant

You'll get:



Assessment letter detailing
our findings and
recommendations for next
steps



Original documents and a
full set of copies



Tabbed file box to keep the
estate administration
organized and our guide for
administering an estate



An offer to help you admin-
ister the estate or a
personal introduction to
another attorney who
specializes in what you need

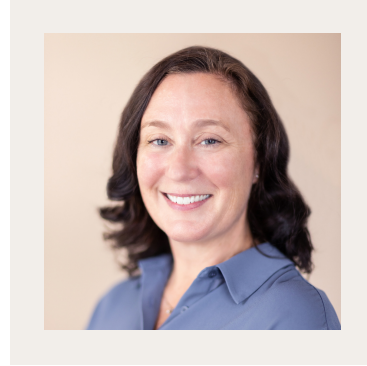
Our Team



Sarah Jordan

Owner & Attorney
sarah@jordanlawfirmpllc.com

Sarah provides legal counsel, research, drafting, and strategizing on all client matters.



Jennifer Evans

Legal Assistant
jennifere@jordanlawfirmpllc.com

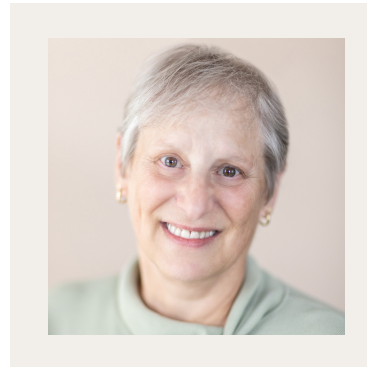
Jennifer helps draft legal documents and is our all-around problem solver.



Isabel Zyla

Administrative Assistant
isabelz@jordanlawfirmpllc.com

Isabel takes care of clients and handles office operations.



Deborah Binder

Outreach Specialist
deborahb@jordanlawfirmpllc.com

Deborah provides outreach to the community on our estate and probate services.



confidentiality

We keep confidential all information relating to you, including the fact that you are a client, the content of our conversations, and your personal information. Sarah can invoke attorney-client privilege if she is ever compelled to reveal your information.



communication

We keep you informed about the status of your legal matter. Phone and email are the best ways to contact us. We can also video conference through Zoom. We aim to return messages within two business days.



conflicts

We avoid conflicts of interest. We check for conflicts before representing you to make sure that Sarah can be your attorney. If, during the course of working with you, a conflict of interest arises, Sarah may have to withdraw from working on your project. But don't worry; it's rare.

Our Services

Estate Planning	Estate Administration	Also...
Wills & Trusts	Probate	Deeds
Powers of Attorney	Trust Administration	Prenuptial Agreements
Health Care Directives & HIPAA	Small Estates	Community Property Agreements
Estate Plan Review	Advice & Counsel	Estates for Creatives
Minor Guardianship	Beneficiaries & Heirs	Pet Considerations
Business Succession	Estate Assessments	Notary Available



NEED HELP?

SCHEDULE A CALL

CONTACT:

FRONTDESK@JORDANLAWFIRMPLLC.COM

OR VISIT: [JORDANLAWFIRMPLLC.COM/CONTACT](https://www.jordanlawfirmpllc.com/contact)



We would love to connect with you! Take a look at our social media handles below and follow us or give us a 'heart' on NextDoor.

Of particular interest may be our Facebook Group called Wills, Trusts, and Guardianship Washington State, where we post tips, updates to the law on trusts and estates, and answer members' questions on these topics.

Register for a free Wills Workshop at jordanlawfirmpllc.com/wills-workshop.

It's always a pleasure to connect with clients and our community, so find us and reach out!

Sarah Jordan


Social Media

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 [/pages/jordan-law-firm-pllc](#)