Fictional sample estate summary

Demonstration only. Not a court filing.

Deceased	**ZZ SAMPLE tennessee-formal-probate**
Date of death	Aug 20, 2026
State	Tennessee
County	Not provided
Executor / personal representative	ZZ SAMPLE Executor
Packet generated	Sep 9, 2026

Roadmap deadlines

Dates are planning estimates unless marked "Set by statute." Confirm each with your court.

Task	Category	When	Source
Agree how personal belongings will be divided	First Month	Due Sep 19, 2026	Estimated
Deal with the digital accounts and subscriptions	First Month	Due Sep 19, 2026	Estimated
Determine whether probate is needed - small estate vs. full administration	First Month	Due Sep 19, 2026	Estimated
File Life Insurance Claims	First Month	Due Sep 19, 2026	Estimated
Find every account before you close anything	First Month	Due Sep 19, 2026	Estimated
Get an EIN and open an estate bank account	First Month	Due Sep 19, 2026	Estimated
Keep the home insured, powered and maintained	First Month	Due Sep 19, 2026	Estimated
Notify Banks and Financial Institutions	First Month	Due Sep 19, 2026	Estimated
Open the estate and obtain letters from the probate court	First Month	Due Sep 19, 2026	Estimated
Small Estate Petition Waiting Period	If it applies	Available Oct 4, 2026	Set by statute
Creditor Claim Bar - Four Months from First Publication	Deadline	Window ends Dec 20, 2026	Estimated
Estate Income Tax Return (Form 1041)	If it applies	Due Apr 15, 2027	Estimated
Final Individual Income Tax Return	If it applies	Due Apr 15, 2027	Estimated

Task	Category	When	Source
Federal Estate Tax Return Due if Required	If it applies	Due May 20, 2027	Set by statute
Surviving Spouse Elective Share Claim	If it applies	Due May 20, 2027	Set by statute
Creditor Claim Outer Limit - Twelve Months from Death	Outer limit	Due Aug 20, 2027	Set by statute

Creditor Claim Bar - Four Months from First Publication: Measured from the day you publish notice to creditors; a projection until then.

Asset inventory

Asset	Type	Value at death	Passes by	Location
The house on Chestnut Street	Real estate	$385,000.00	Probate	-
First Horizon checking	Bank account	$22,100.00	Probate	-
Term life policy	Life insurance	$150,000.00	Named beneficiary	-
2016 Toyota Camry	Vehicle	$11,200.00	Unknown	-

Total recorded value (4 assets) **$568,300.00**

Charge and discharge accounting

A double-entry presentation: total credits are built from total charges, so they match by construction. That confirms categorization, not that the underlying figures are correct.

Charges (what came into the executor's hands)

Inventory at date of death $418,300.00

Money collected into the estate $1,200.00

Total charges **$419,500.00**

Assets with a named beneficiary or payable-on-death designation totaling $150,000.00 pass outside probate and are excluded from the charges above.

Credits (what left the estate, and what remains)

Money paid out $8,958.00

Distributions to beneficiaries $0.00

Balance remaining on hand $410,542.00

Total credits **$419,500.00**

Owed back to you personally (tracked separately) $240.00

Fictional, read-only example prepared September 9, 2026. Amounts and completed steps are illustrative. The roadmap uses Settled's current builder. No personalized legal analysis is included. Confirm requirements with the court or a qualified professional. Settled is an informational tool, not a law firm, and does not provide legal, tax, or accounting advice. This packet is a working summary generated from the details you entered. Deadlines are planning estimates. Confirm every date, figure, and requirement with the probate court or a licensed attorney before you file or distribute.