

LAWRENCE S. TOLCHINSKY, P.A.
ATTORNEY AT LAW

2100 E. Hallandale Beach Blvd. Suite #200
Hallandale Beach, Florida 33009
Telephone (954) 458-8655
Facsimile (954) 455-3388

Website: <http://www.HallandaleLaw.com>

Dated:

Name
Address

Re: Decedent

Dear Client;

Thank you for calling on my office to assist you the administration of _____ estate. As promised, below is a list of ordinary legal services associated with a Formal Administration in a Florida Probate.

Those services include:

Review, analysis and interpretation of testamentary documents and explanation of the dispositive provisions and procedures.

Preparation of pleadings and papers to be filed with the probate court.

Appointment of the Client by the court as personal representative of this estate.

Service of legal notices on persons required to be served in the manner provided by law.

Advice regarding obligations to account to the court and interested persons and the procedures for same.

Counsel regarding the duty to protect, insure and manage estate assets.

Counsel regarding the duty to make assets productive of income and limitations imposed by the prudent investor rule.

Counsel regarding inter-relationships of any trust created by decedent with the probate estate and duties and obligations of, and to, the trustee.

Counsel regarding the duty to locate and notify estate creditors, duty owed by the Client to creditors and the procedures and priorities in payment or compromise of claims, and payment of expenses of administration.

Advice on elective share, family allowance, and exempt property entitlements and considerations of homestead real property.

Advice on the requirements to inform and account to interested persons.

Advice on filing requirements for various tax returns required to be prepared and filed by Client, including decedent's final income tax return, income tax and intangible tax returns for the estate and an estate tax return.

Clearance of tax liens from estate property and advice on matters of clear title to real property.

Advice on abatement or ademption of devises and obtaining of court order if applicable.

Interim and final distribution of cash, specific and other devises, and estate residuary including preparation and recording of certificate of distribution of real property.

Advice on avoidance of self-dealing, conflicts of interest, duty of impartiality and obligations to creditors and beneficiaries.

This is a comprehensive list of services. Therefore, if you are unsure about any of these items, please feel free to contact me and I will be happy to answer your question(s).

Again, thank you for calling on us during this difficult time.

Kindest regards,

Larry S. Tolchinsky, Esq.