

Probate Timeline

The length of time for probate depends on several factors, such as the size of the estate, the number of taxes and debts to pay, tax issues, the number of heirs, and any contested issues of a will. A typical probate process will take up to 24 months from the date of the decedent's death.

Here's a basic timeline:

Duration	Probate Process Description
1 to 12 months	Prepare and file "petition for probate" by: Proving the validity of a will Choosing an estate administrator, executor, or representative Identifying all heirs and other relatives
6 to 12 months	Court hearing on petition for probate
6 to 12 months	Issue the following documents, if applicable: Letters of administration Letters testamentary Orders for probate, duties and liabilities
4 to 8 months	Issue probate bond (if ordered)
3 to 6 months	Notice to creditors
6 to 12 months	Notice to creditors Notice to Department of Health Services (if the decedent received medical benefits)
6 to 12 months	Estate inventory and appraisal to calculate the estate's value
6 to 12 months	Pay bills and taxes: All applicable taxes Estate administration costs Family allowances
6 to 12 months	Accept or deny creditor claims
8 to 15 months	Tax clearance letters
7 to 15 months	File petition for final distribution and accounting
8 to 16 months	Hearing on petition for final distribution and accounting
8 to 16 months	Order approving final distribution and accounting
9 to 18 months	Distribution of assets to heirs
9 to 18 months	Final discharge order
9 to 24 months	Final distribution of estate funds, concluding probate

Note: The above timeline may not apply to cases with more complicated issues or potential lawsuits.

IHT400 Timeline

Here is a basic timeline for when you will hear back about your IHT400 form:

Week	IHT400 Progress
Week 1 and 2	<p>HM Revenue and Customs will create a detailed record of the assets, debts, reliefs and exemptions that you've told us about in the form IHT400. They will then calculate the tax and any interest due now and send you their calculations with a letter telling you what happens next.</p> <p>If you have paid enough tax, HM Revenue and Customs will issue your IHT421 or certificate of confirmation. They aim to issue your IHT421 within 10 days of receiving your form IHT400 Inheritance Tax Account or payment of tax, whichever is later.</p> <p>HM Revenue and Customs will tell you if they are going to look at your form IHT400 in more detail within the letter you receive. They will give you a deadline date by which you will hear from them if they are going to carry out a compliance check or check any valuation.</p>
Week 3 to 14	<p>If HM Revenue and Customs cannot close your IHT400 account straightaway, they will look at the information you have given them in more detail. They will select some IHT400's for a more in-depth compliance check. They will write to you if they do this.</p> <p>HM Revenue and Customs may ask the Valuation Office Agency (VOA) or Shares & Assets Valuation (SAV) to check the valuations. The VOA or SAV may contact you if this is the case. This can take up to 12 weeks.</p>
Week 14	<p>The deadline date HM Revenue and Customs give you in your letter during weeks 1 and 2 will be due now. If you have not heard from HM Revenue and Customs by now, you can assume they do not have any questions to ask you about the information and values you gave in your form IHT400.</p> <p>It is up to you to decide how to administer the estate, but you may choose to distribute some of the assets now.</p>
Week 15 to 20	<p>If HM Revenue and Customs select your IHT400 for a compliance check, they will consider all of the information they have and explain what they are checking by phoning you. They will do this within 8 weeks of the letter being sent to you about the check. They may ask you for more information and agree a date for supplying this. If they do this, they usually write to confirm what was agreed.</p> <p>If the VOA or SAV agree a higher value for any of the assets, HM Revenue and Customs will send you a new calculation once the value is agreed. They will not contact you about the valuation unless negotiations have come to a standstill.</p>
Week 20 onwards	<p>If there are changes, tell HM Revenue and Customs about these when you believe that the values are final, or 18 months have passed since the date of death, whichever is earlier. Before this, you only need to tell them if:</p> <ul style="list-style-type: none"> • The changes relate to the value of land, buildings or unlisted shares • When you've sold land or shares at a loss • You've sold assets on which you were paying tax by instalments • The increase or decrease in the value of the estate is more than £50,000, before any exemptions or reliefs • The person who died made a gift with reservation of benefit or had the right to benefit from a trust when they died • HM Revenue and Customs are carrying out a compliance check on the estate <p>You can calculate the additional tax and make a payment on account to stop or reduce any interest HM Revenue and Customs may charge. They send you final calculations when you tell them about any changes.</p> <p>If you need clearance, apply using form IHT30. Do not do this until you think that all the values in the estate are final and there will be no more changes to report.</p> <p>HM Revenue and Customs will not normally issue clearance if less than a year has passed since date of death.</p>