

# The Personal Representative's Guide to Michigan Probate.

What you're actually responsible for — and how to avoid the most costly mistakes. Written for first-time personal representatives. Plain English. Free.

LENGTH

12 pages · 8 sections

FOR

First-time PRs

REGION

Michigan · Oakland County

— WELCOME

# A practical guide for the work that falls to you.

If you've been named Personal Representative of an estate in Michigan, you've inherited a job most people never planned for — and one that doesn't come with a manual. This guide is the one we wish we'd had.

It walks you through what the role actually involves, where the attorney's job ends and yours begins, the mistakes we see most often, and a checklist you can work from day one.

Read it cover to cover, or skip to the section you need. Either way — you don't have to figure this out alone.

**“Your attorney handles the legal side. We handle everything else.”**

BY THE NUMBERS

**5–24**

MONTHS TO

CLOSE

PER-MONTH COST

**\$1K–\$2.5K**

Property taxes, insurance, utilities and maintenance — on a typical Oakland County home, every month without a plan.

NOTICE DEADLINE

**4 months**

To publish and mail Notice to Creditors after your appointment as PR.

— INSIDE THIS GUIDE

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## SECTION ONE

# 01 What Is a Personal Representative?

When someone passes away with a will, the court appoints the person named in the will to manage and settle the estate. That person is called the Personal Representative — sometimes referred to as an executor. If there is no will, the court appoints an administrator. Either way, the role comes with significant legal and practical responsibilities.

## Your core responsibilities

- Inventory all assets of the estate — bank accounts, real property, personal property, investments.
- Notify creditors and government agencies of the death (Social Security, banks, insurance companies).
- Pay valid debts and estate expenses from estate funds.
- File required tax returns — final personal return, estate tax return if applicable.
- Distribute remaining assets to heirs and beneficiaries per the will or Michigan intestacy law.
- Petition the court to close the estate once all obligations are met.

## What the attorney handles vs. what you handle

Your probate attorney handles the legal filings — the petition to open probate, court notices, legal documents, and the final closing papers. That's their lane.

Everything else is yours: managing the property, coordinating vendors, dealing with family dynamics, making decisions about real estate, handling personal belongings, and keeping the process moving forward. The attorney advises. You execute.

**The attorney handles the legal side. You handle everything else. Understanding that distinction is the first step to doing this job well.**

## The emotional reality

You're doing this job while grieving. You may be managing the expectations of siblings, extended family, or beneficiaries who don't agree on what should happen. You may be out of state, trying to coordinate everything remotely. You may have never done anything like this before.

That's normal. And it's exactly why resources like MI Probate Agent exist.

## SECTION TWO

# 02 The Attorney Gap.

Here's one of the most common things we hear from Personal Representatives: *“I thought the attorney was handling everything.”*

It's an understandable assumption. You hired a probate attorney, you're paying them to manage the estate, and you trust that means the whole process is covered. The reality is more complicated — and not understanding the gap is one of the most common reasons estates stall for months or years.

## WHAT ATTORNEYS ACTUALLY DO

- File the petition to open probate with the court.
- Draft and file legal notices required by Michigan law.
- Advise you on your duties and liabilities as PR.
- Prepare the inventory and accounting documents.
- Handle any legal disputes or will contests.
- File the petition to close the estate.

## WHAT ATTORNEYS DON'T DO

- Secure or maintain real property.
- Coordinate property cleanouts or repairs.
- Deal with tenants or personal property left in the home.
- Manage relationships with grieving family members.
- Make decisions about whether to sell, hold, or transfer real estate.
- Find, vet, and coordinate service providers.
- Handle the day-to-day logistics of the estate.



### THE GAP

The space between “the legal work is done” and “the estate is actually closed” is where families get stuck. It's where estates sit for years. And it's exactly what MI Probate Agent exists to bridge.

*Attorneys are essential. But they're legal advisors, not project managers. The project management falls to you — unless you have the right support.*

## SECTION THREE

# 03 Common Mistakes PRs Make.

Most Personal Representatives are first-timers. That's not a criticism — it's just the reality. And because of that, the same costly mistakes come up again and again. Here are the ones we see most often.

## 01 Not securing the property immediately.

Vacant homes are targets. Vandalism, theft, and weather damage can occur within days of a property being unoccupied. Change the locks, check the windows and doors, and make sure insurance is still active — day one.

## 02 Letting the house sit without a plan.

Every month a property sits costs the estate money: taxes, insurance, utilities, maintenance. On a typical Oakland County home, that's \$1,000 to \$2,500 per month. Waiting for the “right time” often just means more money out of the estate.

## 03 Assuming the attorney will handle real estate decisions.

The attorney can advise on the legal mechanics of selling. They won't tell you what the property is worth, whether to sell as-is or renovate, how to price it, or how to find a buyer. That's your call — unless you have a probate-specialized professional helping you.

## 04 Not understanding the difference between selling during probate vs. after.

Under Supervised Administration, selling real estate requires court approval. Under Unsupervised Administration, you generally have authority to sell without a court order — but the rules matter, and getting them wrong creates delays and liability.

## 05 Accepting the first offer out of exhaustion.

Probate is draining. By the time an offer comes in, many PRs just want it to be over. But the first offer is rarely the best offer. Proper marketing and negotiation can add \$10,000 to \$50,000 or more to the estate's net proceeds.

## 06 Not consulting a probate-specialized professional before listing.

A general real estate professional may not understand court timelines, estate sale requirements, or how to work with a probate attorney. The wrong professional can slow the process and cost the estate money.

## 07 Missing creditor notification deadlines.

Michigan law requires Notice to Creditors to be published and mailed within 4 months of your appointment. Missing this deadline can expose you personally to liability. It's one of the most overlooked administrative requirements.

## SECTION FOUR

# 04 Your Probate Checklist.

Probate has a lot of moving parts. This checklist gives you a practical roadmap from appointment to closing. Every estate is different — work with your attorney on anything specific to your situation.

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## Phase 1 — Appointment & First 30 Days

DAYS 0–30

Stand the estate up. Secure what's vulnerable. Open the channels you'll work through for months.

- Obtain Letters of Authority from the probate court.
- Notify financial institutions of the death and your appointment as PR.
- Notify government agencies: Social Security Administration, Veterans Affairs (if applicable), pension/retirement accounts.
- Secure all real property — change locks, document condition with photos, check insurance.
- Begin asset inventory: bank accounts, investments, real estate, vehicles, personal property.
- Open an estate bank account to manage estate funds separately.
- Notify known creditors in writing of the death.

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## Phase 2 — Claims & Maintenance

DAYS 30–90

The administrative middle. Notices are running, claims are coming in, decisions on property are due.

- Publish Notice to Creditors in a local newspaper (required by Michigan law).
- Mail Notice to Creditors to all known creditors.
- Continue asset inventory and obtain appraisals where needed.
- Review and maintain insurance on all estate property.
- Determine plan for real property: sell, transfer to heirs, or hold.
- File any required tax returns (check with your CPA or estate attorney).
- Review and respond to creditor claims as they come in.

## CHECKLIST · CONTINUED

# Closing the estate.

The final stretch: settle every debt, account for every dollar, distribute what remains, and ask the court to close. Clean documentation here is what lets you close cleanly and move on.

## Phase 3 — Closing the Estate

FINAL MONTHS

Settle, account, distribute, close. Documentation matters here — keep clean records.

- Pay all valid debts, taxes, and estate administration expenses.
- Prepare a final accounting of all estate income, expenses, and distributions.
- Distribute remaining assets to heirs and beneficiaries.
- Obtain receipts or waivers from beneficiaries.
- Petition the court for final distribution and order closing the estate.
- File all required closing documents with the probate court.

### One more thing.

Keep your records — every bank statement, receipt, invoice, and signed waiver — for at least seven years after closing. The estate is closed, but questions can still come up.

SECTION FIVE

# 05

# How MI Probate Agent Helps.

Most people assume the probate attorney handles everything. They handle the legal side. We handle everything else.

MI Probate Agent was built by someone who has personally served as a Personal Representative. We know the gap between “the legal work is done” and “the estate is actually closed” — because we’ve lived it. That gap is where families get stuck. It’s what we exist to bridge.

**Our mission: empower families with the best information and the right resources, so they can make the most educated decisions for their specific situation — not ours.**

## Coordination & Vendor Management

You shouldn't have to be the project manager for 12 different vendors while you're grieving. We handle it.

- Single point of contact for everything that needs to be coordinated.
- Personally vetted local professionals — painters, handymen, landscapers, cleanout crews.
- Housekeeping and property maintenance for absentee owners.
- Mediation services if disputes arise between family members.

## Family & Transition Support

Probate doesn't happen in a vacuum. People need to move. Seniors need care. Life keeps going.

- Relocating family members.
- Senior downsizing and senior moving services.
- Help finding elder care resources.
- Social services navigation for surviving spouses.
- Help with pet rehoming, mail forwarding, and other transition needs.

## Estate & Personal Property

Before you can sell the house, you often have to deal with everything inside it.

- Estate inventory and organization.
- Estate sales coordinated with reputable estate sale professionals.
- Auction sales, consignment, and charitable donation arrangements.
- Full property cleanouts — dumpster coordination, junk haul-aways, labor.
- Moving personal property to secured self-storage.
- Help with collectibles and inheritance cash advances.

## Real Property in Probate

Whether the goal is to sell, transfer, or hold — we handle what needs to be handled with the property.

- Property visits, securing vacant property, and lock changeouts.
- Weatherization, winterization, and ongoing maintenance.
- Property rehab and renovations (coordinated, not just recommended).
- Property evaluation and market analysis — no pressure.
- Help selling: traditional listing or as-is/cash sale.
- Title and deed issues; live-in tenants; reverse mortgage; pre-foreclosure.

— HOW WE HELP · CONTINUED

# Planning, support, and how we're compensated.

## Planning for a Better Future

Once you've been through probate, you don't want your family to go through it too. We connect you with the right professionals.

- Referrals for wills, revocable living trusts, and transfer-on-death deeds.
- Beneficiary designation reviews and life insurance policy lookups.
- Estate planning professionals: CPAs, financial advisors, attorneys.
- Small estate affidavit process for eligible estates.

## — HOW WE'RE COMPENSATED

**Free to families.  
No retainers.  
No upfront fees.**

When real estate is involved, we earn a standard commission paid at closing from the sale proceeds. When there's no real estate, we're still here to help however we can.

No pressure. No agenda. Just help — whether you're ready to move forward or just trying to understand your options.

## — WHAT IT COSTS YOU

**\$0**

UPFRONT

**\$0**

RETAINER

**\$0**

HOURLY

**\$0**

SUBSCRIPTION

A consultation is just a conversation. We'll tell you straight what your options look like.

**“Your family. Your timeline. Your decision.” — the only three things we ever orient around.**

SECTION SIX

# 06 Real Property in Probate.

For most estates, real property is the single largest asset and the most complex to manage. Whether it's the family home, a rental property, or vacant land, how you handle real estate during probate can make or break the estate's bottom line.

## What to do immediately

- Secure the property — change locks, ensure doors and windows are intact.
- Document the condition with dated photos and video, inside and out.
- Check and maintain insurance coverage; notify the carrier of the owner's passing.
- Winterize if the property will be unoccupied in cold months.
- Remove valuables and secure personal belongings.

PER MONTH

\$1K

-\$2.5K

On a typical Oakland County home. Property taxes, homeowner's insurance, utilities, and basic maintenance accrue from day one. Every month without a plan costs the estate money.

## Two paths: selling during probate vs. after

<p><b>PATH 01</b></p> <p><b>Sell during probate.</b></p> <p>If the estate is under Supervised Administration, you'll need court approval to sell. This adds time but may be necessary. Under Unsupervised Administration, the PR generally has authority to sell without a separate court order — though best practice is to keep the court and heirs informed.</p>	<p><b>PATH 02</b></p> <p><b>Transfer to heirs, then sell.</b></p> <p>The property can be transferred to beneficiaries through the probate process, and they can then sell it themselves. Tax implications differ (stepped-up basis applies at date of death either way) and this may be simpler in some situations.</p>
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# Pricing it right. Picking the right help.

Probate sales don't follow the same rules as a typical residential transaction. Two things matter most: pricing the property honestly for its condition and timeline, and partnering with someone who understands the court process from the inside.

## Pricing in probate is different.

Probate properties are often sold in as-is condition. The house may need work, the PR may not have the budget to make repairs, and the timeline is driven by the court process rather than market convenience. A probate-experienced professional understands how to price for these factors without undervaluing the property.

Underpricing leaves money on the table for heirs. Overpricing stalls the sale and accumulates carrying costs. Getting the number right takes specific experience.

## The right professional saves more than they cost.

A general real estate professional may not understand court timelines, the legal requirements for estate sales, or how to coordinate with the probate attorney. A probate-specialized professional works within the process, not around it — navigating as-is sales, managing buyer expectations, and maximizing the estate's return without unnecessary delays.

The right partner pays for themselves several times over in time saved, complications avoided, and price recovered.

**Real property is where the right help shows up most clearly in the final number.**

## SECTION SEVEN

# 07 Michigan-Specific Resources.

Below are key resources and reference points for Personal Representatives handling probate in Michigan.

## LEGAL FRAMEWORK

### Michigan Probate Code

MCL 700.1101 et seq. Estates and Protected Individuals Code, known as EPIC.

### Typical probate timeline

5 to 12 months for Unsupervised Administration; 12 to 24 months for Supervised Administration.

### Letters of Authority

Issued by the probate court. Required to act on behalf of the estate with banks, insurance companies, and other institutions.

## COURT INFORMATION

### Oakland County Probate Court

1200 N. Telegraph Rd., Pontiac, MI 48341  
(248) 858-0250

### Michigan Courts case search

[micourt.courts.michigan.gov](http://micourt.courts.michigan.gov)

## KEY DEADLINES & REQUIREMENTS

### Notice to Creditors

Must be published in a local newspaper and mailed to known creditors within 4 months of the PR's appointment.

### Creditor claims period

Creditors generally have 4 months from the date of the published notice to file claims.

### Property taxes

Continue to accrue during probate. The principal residence exemption may be at risk if the property is no longer owner-occupied.

### IMPORTANT — NOT LEGAL ADVICE

This guide is for informational purposes only and does not constitute legal advice. Every estate is different. Consult a Michigan probate attorney for advice specific to your situation.

SECTION EIGHT

# 08 About Casey Matteson.



Casey Matteson has helped hundreds of Michigan families navigate one of the most challenging experiences of their lives: the probate process. From coordinating property cleanouts and vendor management to guiding complex real estate decisions under pressure, Casey has been a trusted resource for Personal Representatives who needed more than just an attorney — they needed someone to help them get things done.

Casey's understanding of probate goes beyond professional experience. He has personally served as a Personal Representative, managing an estate from start to finish. He knows what it's like to sit in the probate court, sort through a loved one's belongings, make difficult decisions under time pressure, and try to do right by everyone involved. MI Probate Agent was built from that experience — because no family should have to navigate this alone.

**“I've been where you are. I know how overwhelming it feels. That's exactly why I do this work — because I've seen firsthand what happens when families don't have the right support.”**

As a licensed real estate professional in Michigan for over 10 years, Casey specializes in probate real estate, working with Personal Representatives across Oakland County and throughout the state. He operates under Real Broker and has dedicated his practice to serving families during one of life's most difficult transitions.

EXPERIENCE

**10+ yrs**

Licensed in Michigan

FAMILIES HELPED

**Hundreds**

Across the state

FOCUS

**Probate**

Real estate & coordination

BROKERAGE

**Real**

Broker, Michigan

# You don't have to figure this out alone.

## We've been exactly where you are.

Whether you're ready to move forward or just trying to understand your options — we're here. No pressure. No agenda. Just help.

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WEB

[MIProbateAgent.com](https://MIProbateAgent.com)

SERVICE AREA

Oakland County & statewide MI

BROKERAGE

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PR