

General Information for Closing  
an Independently Administered Estate  
Rev. 09/2023  
Probate Form No. D20

Information that you enter on these forms can be saved on your computer **ONLY** if you are using Adobe Acrobat Version 8.0 or higher. They can be completed using the **FREE** Adobe Reader but you will not be able to save the information you enter.

The forms listed below are interactive. You can enter the information on these forms before you print them. If you fill the forms in on your computer, much of the information you enter on one form is automatically transferred to the other forms.

The packet contains bookmarks. These bookmarks help you navigate throughout these forms. There are “links” embedded in the forms. These links are usually green, and can take you to a related location in the forms.

The Requirements Checklist is included in the packet.

Independently administered estates are typically distributed under the procedures outlined in RSMo. § 473.840. Contained in this packet are the approved forms to file the required statement of account along with information regarding what items may be waived by all heirs (intestate) or beneficiaries (testate) by consent.

## Table of Contents

You may click on the underlined text below to take you to each of the forms.

1. [Checklist of Requirements to Close an Independently Administered Estate](#)  
Used as a guideline for all requirements to close an independent administration decedent estate.
2. [Notice of Filing Statement of Account and Proposed Schedule of Distribution](#)  
This form should be completed by the attorney. It requires the personal representative's signature and **must** be notarized. Used to notify all interested parties of the intent to file the Statement of Account and Schedule of Proposed Distribution. This form is not required if waiver of stator requirements are filed by all interested parties.
3. [Statement of Account](#)  
This form consists of several documents – Statement of Account, Complete Accounting, Proposed Schedule of Distribution and Proof of Mailing of Notice of Filing Final Statement of Account and Proposed Schedule of Distribution. This form should be completed by the attorney. All forms require the personal representative's signature which **must** be notarized on the Statement of Account and Proof of Mailing of Notice of Filing Final Statement of Account and Proposed Schedule of Distribution. It should be completed with the requested information. If there are areas that are not applicable, put N/A. Do not leave any section blank. The Proof of Mailing of Notice is not required if the Waiver of Statutory Requirements are received by all interested Parties.  
The Statement of Account may not be waived unless the Personal Representative is the SOLE Interested Party. Interested Parties may only Waive Section II. Complete Accounting of the Statement of Account.
4. [Waiver of Statutory Requirements – Statement of Account and Closing of Estate](#)  
This form may be filed by all interested parties waiving the statutory requirements in connection with the Statement of Account and termination of the estate. It must be initialed next to each requirement waived. It **must** be signed and notarized. The filing of the Statement of Account cannot be waived; however, the interested parties may Waive Section II. Complete Accounting. A Waiver is not necessary if the sole heir or beneficiary of the estate is also the personal representative.

**CIRCUIT COURT OF ST. LOUIS COUNTY  
PROBATE DIVISION**

**Checklist of Requirements for Closing  
an Independently Administered Estate**

The Court will use the checklist below to determine whether an independently administered estate is ready to be closed pursuant to section 473.840 RSMo. The Court will review the Statement of Account to determine if the provisions of section 473.840 RSMo have been satisfied. The Court does not audit the Statement of Account but will review it for significant discrepancies. These discrepancies will usually be brought to the attention of the independent personal representative through a **"For Information Only"** exception which **does not require any action**. If an exception does issue, other than "For Information Only", the discrepancy must be corrected.

- Final Court Costs must be paid – please check the header tab under casenet to obtain any final outstanding court costs. If no financial button exists, then no costs are outstanding;
- Missouri HealthNet release, waiver or satisfaction of claim <https://dss.mo.gov/mhd/general/pdf/886-4354.pdf>;
- At least 6 months and 10 days have passed from date of first published notice of letters testamentary or of Administration;
- No pending Will Contest, Objections, or Motions. If so, contact the Court to request a hearing. Motions for Compensation in Excess of Statutory Amount will be handled as outlined below;
- Publication of filing Statement of Account or Waivers from all heirs, legatees and interested parties. Pursuant to 473.840.3 RSMo, interested parties include creditors whose claims have been timely filed but have not been paid. Pursuant to 472.110 RSMo, the Affidavit of Publication must be filed with the court. To order final publication, please contact the Countian or Legal Ledger directly;
- Proof of mailing to all heirs, legatees, and interested parties or waivers from all such parties. Pursuant to 473.840.3 RSMo, interested parties include creditors whose claims have been timely filed but have not been paid;
- Statement of Account filed with the court that is signed by personal representative, notarized and contains information required in Section 473.840.2;
- Proposed Schedule of Distribution – it is the duty of the personal representative to ensure that distributions are correct and in compliance with the Decedent’s Last Will and Testament or the intestate statute of the state of Missouri; and
- Waivers from all Interested Parties are notarized.

**PROCEDURE FOR COMPENSATION OF  
PERSONAL REPRESENTATIVE AND/OR ATTORNEY**

- 1.0 If a personal representative or attorney is seeking compensation pursuant to the statutory fee outlined in section 473.153 RSMo, no order of the Court is required.
  
- 2.0 If a personal representative or his or her attorney is seeking fees in excess of the statutory fee outlined in section 473.153 RSMo, he or she should file an application seeking fees in excess of the statutory fee **concurrently with the Statement of Account**. If no objections are filed within the 21 day objection period, the court will act on the application for fees ex parte. If objections are filed, the court will set the matter for hearing with notice to all interested parties.



IN THE CIRCUIT COURT OF SAINT LOUIS COUNTY  
STATE OF MISSOURI  
PROBATE DIVISION



IN THE ESTATE OF

ESTATE NUMBER

Deceased.

**NOTICE OF FILING STATEMENT OF ACCOUNT  
AND PROPOSED SCHEDULE OF DISTRIBUTION**

To all persons interested in the estate of \_\_\_\_\_, deceased:

1. Notice is hereby given that the undersigned independent personal representative of said estate will file a Statement of Account in the Probate Division of the Circuit Court of St. Louis County, Missouri on \_\_\_\_\_, or as may be continued by the court.

2. If no objection to the Statement of Account or the Proposed Schedule of Distribution is filed in the court within twenty (20) days after the filing of the Statement of Account, the independent personal representative will distribute in accordance with the schedule of proposed distribution contained in the Statement of Account.

3. If no proceeding is commenced in the court within six months after the filing of the Statement of Account, the undersigned independent personal representative is discharged from further claim or demand by an interested party.

The undersigned swears that the matters set forth above are true and correct to the best knowledge and belief of the undersigned, subject to the penalties of making a false affidavit or declaration.

\_\_\_\_\_  
**Personal Representative**

STATE OF MISSOURI     )  
  ) SS.  
COUNTY OF \_\_\_\_\_ )

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_  
Notary Public





All claims, expenses of administration and taxes have been paid, in full, except the following, together with an explanation why said items have not been fully paid:

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The independent personal representative will distribute the remaining probate assets in accordance with the following schedule of proposed distribution, unless objection to the proposed distribution is filed in court within twenty (20) days after the filing of the foregoing statement of account.

The undersigned swears that the matters set forth above are true and correct to the best knowledge and belief of the undersigned, subject to the penalties of making a false affidavit or declaration.

\_\_\_\_\_  
**Personal Representative**

STATE OF MISSOURI     )  
  ) SS.  
COUNTY OF \_\_\_\_\_ )

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_  
Notary Public



**PERSONAL PROPERTY (IF ANY)**

The balance of cash and other personal property shown on the foregoing statement of account will be distributed as follows:

DISTRIBUTE	RELATIONSHIP TO DECEDENT OR ARTICLE /SECTION OF WILL	CASH	OTHER PERSONAL PROPERTY

Notice of the appointment of the personal representative under sections 473.033 and 473.783, RSMo, was given, and the first publication of such notice occurred on 1/1/2021, which was more than six months and ten days before the filing of this statement of account.

Notice was given in the manner provided by section 472.100.2(2), RSMo, at least twenty-nine (29) days prior to the filing of the statement of account, which notice stated that: (a) the independent personal representative would file the statement of account on a date certain or as continued by the court; and (b) objections to the schedule of proposed distribution shall be filed with the court within twenty (20) days after the filing of the statement of account.

The foregoing is made under oath or affirmation and its representations are true and correct to the best knowledge and belief of the undersigned, subject to the penalties of making a false affidavit or declaration.

\_\_\_\_\_  
Personal Representative

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, State, Zip

Subscribed and sworn to before me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Attorney for Personal Representative

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email Address



