

Make us your first call

Tollfree: (844) OAK-SOLD
Local: (561) 331-8899



Full-Service Probate

About The Oak Agency

The Oak Agency was founded by Deborah Puleo for one reason and that is to add a strong force of integrity driven real estate agents to work with the public. Deborah serves her community as a Guardian Ad Litem being the voice of children in need. The Oak Agency; led by Deborah works with the public to make a difference in individual's lives with each transaction as well as on a community level.

Deborah Puleo has been selling real estate for the last 16 years and is a South Florida native. It is a passion of hers and her view on real estate is that it is not only a monumental personal moment, but it's also an investment for her clients. Her loyalty and commitment to clients has gained her lifelong friends and many satisfied clients that instill complete trust and confidence in Deborah. It's no wonder that Deborah has established a team of agents that are like-minded and work hand in hand with Deborah to serve clients in all South Florida and volunteer in our communities! We don't just sell real estate, we LOVE real estate!



Probate Service with The Oak Agency

Probate has long been referred to as a painstaking process and given the circumstances it is easy to understand why probate has gotten such a bad rap. One of the most important decisions to make during this process is to be sure that you have selected an experienced lawyer and real estate agent. At The Oak Agency, we have invested the time and money to find the best lawyers to team up with our agents so we can give you the service you deserve. It is imperative that you have professionals that can advocate for you and your family during a potentially stressful process. We make it simple, so you can rest easy. It is our priority to provide you the best service and retain highest price for your estate property.



How we Work:

Step 1: Contact/Meet with our Office

Step 2: Determine what services you require

Step 3: Engage Us

Step 4: Let the Experts do the Rest!



Managing the sale of a probate



Keeping a Case Diary and tracking important Deadlines

Write Date Here

- _____ 1. Date of Death
- _____ 2. Date of Filing of Will with Florida Superior Court
(within 90 days of death)*
- _____ 3. Date of Court's Order Appointing Personal Representative
(Letters of Administration)
- _____ 4. Date of First Newspaper Notice to Creditors
(within 20 days of the appointment of the Personal Representative)*
- _____ 5. Date of Notification to Interested Persons
(within 20 days of the appointment of the Personal Representative)*
- _____ 6. Date of Inventory of Assets Provided to all Interested Persons
(within 3 months of the appointment of the Personal Representative)*
- _____ 7. Expiration Date for Filing of Estate Creditors' Claims with the Personal Representative
(within 6 months of the date of first legal notice publications)*
- _____ 8. Decedent's personal Florida and Federal Income Tax Returns Due
(April 15 of year after death)
- _____ 9. Federal Estate Tax Return Due if estate value requires it.
(9 months from the date of death)
- _____ 10. Florida Estate Tax Return Due if estate value requires it
(10 months from the date of death)
- _____ 11. Florida and Federal Estate Income Tax Return Due
(3 1A months from end of each tax year of estate)
- _____ 12. Automatic Termination of Unsupervised Personal Representative's Appointment
(3 years from date of appointment)
- _____ 13. In Supervised Administration Cases - First Account Due with Court
(One year from the date of first public legal notice) (#4 above)*
- _____ 14. In Supervised Administration Cases - Date of Filing Later Accounts with the Court
- _____ 15. Date Estate Closed
- _____ 16. Date Certificate of Completion is filed with the Florida Superior Court



* Time lines specified in Florida Probate Reform Act. Verify information with your CPA and/or Attorney. Please note we are not providing legal or accounting advice nor are we serving in that capacity. We recommend you seek legal counsel if needed. if you need a CPA and/or Attorney, contact us for a list of referrals that could be of service.

Tips to Successfully Complete a Probate?

Probate Process in Four measurable stages:

1st Start the Process

Find the Will and file it with the State of Florida Superior Court Probate Division; and Obtain Florida State Superior Court appointment of the Personal Representative.

In South Florida, we are under the Fifteenth Judicial Court

Website: <http://www.flcourts.org>

2nd Gather and Appraise the Assets

Make an inventory of the assets the decedent owned at death and determine the value of each asset.

3rd Pay the Debts

Determine the debts, taxes and settlement expenses of the estate and pay them.

4th Distribute the Assets

Distribute the remaining assets to the rightful beneficiaries.



Nine Helpful Tips For Personal Representatives:

Be sure to follow the rules listed below to complete the probate process as quickly and easily as possible:

1. Answer all questions on all appropriate forms
2. Supply all documents requested by the Court
3. Watch the calendar to avoid missing filing deadlines
4. File all tax returns for the decedent and the estate
5. Give a copy of the inventory and final accounting to all interested persons
6. Distribute property in accordance with the Will;
7. Be sure assets are reported correctly;
8. Keep a complete record of estate bank statements, cancelled checks, and receipts; and
9. Keep a complete record of estate income, deposits, expenses, and property distributions.



Client's menu of Probate & trust services

What services do you feel you'll need?

We offer our clients high quality, efficient, full-service for all probate real estate-related services, which has saved them a tremendous amount of time, frustration and money. We can help with everything you and your family need; from Estate Sales to Cleanouts and Hauling as well as Real and Personal Property Appraisals to Property Management and so much more while under a listing with The Oak Agency.

Here is a list of some of the services we provide:

In our quest of offering the highest-quality and most efficient service possible for our clients, please review the list and check the appropriate box for the service(s) you feel the estate will need.

(check all that apply)

- | | | |
|--|--|---|
| <input type="checkbox"/> Cleanout / Hauling | <input type="checkbox"/> Maid-Service | <input type="checkbox"/> Moving/Recycling/Donations |
| <input type="checkbox"/> Estate Sale/Auction | <input type="checkbox"/> Home Staging | <input type="checkbox"/> Appraisal, Personal Property |
| <input type="checkbox"/> Property Management | <input type="checkbox"/> Appraisal, Real Prop | <input type="checkbox"/> CFP/Financial Planner |
| <input type="checkbox"/> Title Attorney | <input type="checkbox"/> Title Company | <input type="checkbox"/> Short Sale ("underwater" sale) |
| <input type="checkbox"/> Probate Attorney | <input type="checkbox"/> Paralegal/Filing Forms | <input type="checkbox"/> CPA Estate Tax Return Filing |
| <input type="checkbox"/> Home Inspection | <input type="checkbox"/> Termite Inspection | <input type="checkbox"/> Roof Inspection |
| <input type="checkbox"/> Repairs/Handyman | <input type="checkbox"/> Drywall Repairs | <input type="checkbox"/> Painting (interior/exterior) |
| <input type="checkbox"/> Electrical (repair/replace) | <input type="checkbox"/> Plumbing (repair/replace) | <input type="checkbox"/> Fence/Gate (repair/replace) |
| <input type="checkbox"/> Roof (repair/replace) | <input type="checkbox"/> Window (repair/replace) | <input type="checkbox"/> Floors (repair/replace) |
| <input type="checkbox"/> Kitchen Renovation | <input type="checkbox"/> Bathroom Renovation | Other _____ |
| <input type="checkbox"/> Foundation (repair/replace) | <input type="checkbox"/> Landscaping | |
| <input type="checkbox"/> Conventional Loan | <input type="checkbox"/> Refinance | |
| <input type="checkbox"/> Retail Buyer (market value) | <input type="checkbox"/> Investor Buyer (below market) | |

Our full-service approach will save you time, relieve stress, and maximize the profits of the estate.



Helpful Contacts & Information

Sources for Probate & estates

Florida Probate information

Probate Division
Main Courthouse
205 North Dixie Highway
West Palm Beach, FL 33401
Phone: (561) 355-2986
Email at: clerkweb@mypalmbeachclerk.com

The Florida Bar
Address: 651 E Jefferson St
Tallahassee, FL 32399
Phone: (850) 561-5600
<https://www.floridabar.org/>

Tax Information

U.S. Internal Revenue Service
Phone: (561) 616-2002
1700 Palm Beach Lakes Blvd #130, West Palm Beach, FL 33401

Office of Tax and Revenue
Mark Hamilton
Phone: (850) 617-8347
Florida Department of Revenue P. O. Box 6668
Tallahassee, FL 32314-6668
General Tax Questions, Phone: (850) 488-6800

