

SAFE DEPOSIT BOX INFORMATIONAL SHEET

The application to file a petition to examine a safe deposit box is the first step of a two step process. This proceeding **will not allow you to remove the contents of the box nor close the box with the Bank.**

It will only allow you to search and inventory the contents of the box which is necessary for the second step of the process.

The second step of the process is to have a Fiduciary (a representative, voluntary administrator, executor or and administrator) appointed for the estate. You need to present the Inventory of the box, which was filled out and signed by you and the Bank Representative after examining the box, along with the appropriate petition and paperwork to the department that you are filing your proceeding with.(Probate or Administration Department)

THE APPOINTMENT OF A FIDUCIARY IS NECESSARY IN ORDER TO TRANSACT ANY BUSINESS ASSOCIATED WITH THE ESTATE OF A DECEASED INDIVIDUAL. THAT INCLUDES CLOSING A SAFE DEPOSIT BOX AND COLLECTING AND MARSHALING ANY ASSETS BELONGING TO AN ESTATE.