

Resources

San Francisco Superior Court website

<https://sfsuperiorcourt.org/>

California Courts website

<http://www.courts.ca.gov/>

San Francisco Superior Court – Local Rules

<https://www.sfsuperiorcourt.org/general-info/local-rules>

California Rules of Court

<http://www.courts.ca.gov/rules.htm>

File and Serve Xpress online training

<http://info.fileandservexpress.com/FSXTrainingAndResources>

FSX Special Instructions

<https://resourcecenter.fileandservexpress.com/ResourceCenterDocuments/ViewDoc.aspx?DocumentId=2454>

E-Filing FAQ's

<https://www.sfsuperiorcourt.org/online-services/efiling/efiling-faqs>

Probate continuance e-mail:

probcontinue204@sftc.org

Probate Examiner's Office Monthly Updates:

<https://www.sfsuperiorcourt.org/divisions/probate>

San Francisco Superior Court

400 McAllister Street
San Francisco, CA 94102

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Room 103 – Probate Clerks
Office
(415) 551-3892

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Room 202 – Probate Office
(415) 551-3650

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Courtroom Clerk
(415) 551-3702

Hours: Monday – Friday
8:30 am – 4:00 pm

8:30 am – 2:00 pm (eff. 10/22/18)



San Francisco Superior Court

PROBATE DEPARTMENT

**Document Filing /
E-Filing of
Conservatorship
Guardianship,
Estate, & Trust
Cases**

REQUIRED FORMS

Estates

Original + 2 copies
-DE-111

Trusts

Original + 2 copies

Guardianships

Original + 3 copies

-GC-210
-GC-210(CA)
-PGF-1 (SF Local Form)
-GC-212
-GC-120

Conservatorships

Original + 3 copies

-GC-310
-GC-314
-GC-312
-GC-320
-SF Local Form (*Contact Info*)
-GC-335

BEFORE YOU PAPER FILE

- Are your original documents **two hole-punched**?
- Are your **copies stapled**?
- Are your documents **single-sided**?
- Do you have the correct **number of copies** for your filing?

BEFORE YOU E-FILE

- Have you read the **California Rules of Court (CRC)-2.100-2.111**?
- Have you taken the **File and Serve Xpress online training**?
- Are you familiar with **SF Local Rule 14.93**?
- Have you read the File and Serve Xpress **Special Instructions**?

DOCUMENTS TAKEN AT THE PROBATE COUNTER

- Inventory and Appraisal
- Ex Parte Petition for Final Discharge and Order
- Letters of Administration
- Letters Testamentary
- Original Will/Codicil/Certified/Exemplified copy from Outside Counties
- Certified copy of Death Certificate with Affidavit pursuant to Probate Code 13100, et seq.
- Certified copy of Birth Certificate
- Certified copy of Spousal Property order
- Certified copy of Letters issued in estates administered outside San Francisco County.
- * ALL OTHER PTR + PES DOCUMENTS ARE SUBJECT TO **MANDATORY E-FILING**.

CONFIDENTIAL DOCUMENTS

- Confidential Declaration of Proposed Guardian (SF local form)
- Confidential Supplemental Information – Probate Conservatorship (GC-312)
- Confidential Conservator Screening Form (GC-314)
- Confidential Guardianship Screening Form (GC-212)
- Confidential Status Report on Conservatee (Form P75 – Local Form)
- Confidential Guardianship Status Report (GC-251)
- Bank Statements – **can only be deemed confidential in PCN + PGN cases*

HOW TO AVOID REJECTED PROBATE FILINGS

BASIC FILING REQUIREMENTS

Check basic filing requirements: correct case name and number, completed forms, signatures, and dates. Note: dates must accompany signatures.

CAPACITY

Include the capacity at the top of the document after “attorney for:”, e.g. John Jones, Executor. See San Francisco Local Rule 14.17.

DOCUMENT TITLE

The document title field must match the document title/caption exactly. See SFLR 2.11 (O).

FORMAT OF FIRST PAGE/PLEADING REQUIREMENTS

The entire format of the first page must comply with CRC 2.111. Review all pleading requirements. See CRC 2.100, et seq.

MOTIONS

*(with the exception of **Motion to be Relieved as Counsel**)*

Dates need approval from the courtroom clerk. You must first obtain a hearing date and time from them before filing a Probate motion. The name of the courtroom clerk who provided the date should be written on the document next to or under the hearing date on the pleading/motion. The courtroom clerk's phone number is 415-551-3702.

DEPARTMENT NUMBER

Put the correct Department Number on your papers. The Probate Calendars are heard in Dept. 204, and Probate Ex parte appearances are heard in Dept. 202.

MULTIPLE DUPLICATE DOCUMENTS

Documents that are filed in multiples, such as receipts, consents, waivers or nominations should be submitted together in one submission with one caption page identifying the documents, i.e. “Receipts on Distribution (15)”, rather than submitting 15 separate receipts. Exception: Multiple fee payments are filed separately, i.e. previously exempt or waived fees.

BANK STATEMENTS/BONDS

When e-filing a bond or bank statements, a separate “Declaration of Retention of Original Document” must be filed in the same transaction. See SFLR 14.91.

DECLARATIONS/HANDWRITTEN SIGNATURES

Declarations under penalty of perjury require a handwritten signature on the pleading. See SFLR 2.11.

SCANNING/IMAGING

Documents should be scanned at 300 dpi, black & white (*not color or grayscale*). Document output size of 8.5" x 11" (*100% normal size, not reduced or magnified*).