



Probate Table of Contents

	Client Communications
1.01	Initial Letter to Client
1.02	Letter to Client Confirming Representation
1.03	Letter Transmitting Documents for Client Signature
1.04	Letter Returning Documents to Client or Document Provider
1.05	Letter Informing Client of Hearing Date, Time, and Location
1.06	Letter to Client (Shell)
	Opening the Estate
2.01	Civil Case Information Sheet
2.02	Client Intake Sheet
2.03	Client Intake Sheet - blank form
	Letters to County Clerk
3.01	Letter to County Clerk in County of Probate
3.02	Letter to Other County Clerk
	Actions Before Probate
4.01	Application to Open Safe Deposit and Examine and Remove Papers
4.02	Order to Open Safe Deposit Box and Remove Contents
4.03	Application for Emergency Intervention – Funeral and Burial Expenses
4.04	Order for Emergency Intervention – Funeral and Burial Expenses
4.05	Application for Emergency Intervention – Protection and Storage of Property
4.06	Order for Emergency Intervention – Protection and Storage of Property
	Information Gathering
5.01	Authorization to Furnish Documents and Information
5.02	Letter to Bank Regarding Accounts of Safe Deposit Box
5.03	Verification of Funds on Deposit
5.04	Letter to Broker Requesting Account Information
5.05	Verification of Safekeeping
5.06	Letter to Insurance Company Requesting Information About Policy
5.07	Letter to Creditor Requesting Information About Debt
5.08	Letter Order Death Certificates
5.09	Letter to Employer Regarding Employment and Death Benefits
5.10	Application for Disclosure of Digital Assets Texas Estates Code Section 351.106
5.11	Order for Disclosure of Digital Assets
	Proofs of Death and Other Facts
6.01	Proof of Death and Other Facts (Testate)
6.02	Proof of Death and Other Facts (Intestate)
6.03	Proof of Death and Other Facts (Temporary Administration)
	Independent Administration

7.01	Application for Probate of Will – Independent Executor Names (Sec. 401.001)
7.02	Order Admitting Will to Probate (Sec. 401.001)
7.03	Application for Probate of Will – Ind. Admin by Agreement (Sec. 401.002a)
7.04	Order Admitting Will to Probate (Sec. 401.002a)
7.05	Application for Letters of Independent Administration (by Agreement)
7.06	Order Granting Letters of Independent Administration
7.07	Letter Advising Independent Executor Regarding Duties
7.08	Application for Appointment of Successor Independent Executor
7.09	Order Appointing Successor Independent Executor
7.10	Application for Probate of Will - Designated Administrator
7.11	Order Admitting Will to Probate (Section 254.006)
	Dependent Administration (Testate)
8.01	Application for Probate of Will and for Letters Testamentary (Dependent)
8.02	Order Admitting Will to Probate and Granting Letters Testamentary
8.03	Letter Advising Dependent Executor Regarding Duties
	Administration (Intestate)
9.01	Application for Letters of Administration
9.02	Order Granting Letters of Administration
9.03	Combined Application to Determine Heirship and for Letters of Administration
9.04	Judgment Determining Heirship and Granting Letters of Administration
9.05	Combined Application to Determine Heirship and for Letters of Independent Administration
9.06	Judgment Determining Heirship and Granting Letters of Independent Administration
9.07	Letter Advising Administrator Intestate Regarding Duties
	Temporary Administration
10.01	Application for Temporary Administration
10.02	Order Appointing Temporary Administrator
10.03	Letters of Temporary Administration
10.04	Letter Notice of Appointment of Temporary Administrator
10.05	Application to Enlarge Powers of Temporary Administrator
10.06	Order Enlarging Powers of Temporary Administrator
10.07	Order Making Temporary Administration Permanent
10.08	Final Accounting of Temporary Administrator
10.09	Order Approving Final Accounting of Temporary Administrator
10.10	Application to Close Temporary Administration
10.11	Order Closing Temporary Administration
	Muniment of Title
11.01	Application for Probate of Will as Muniment of Title
11.02	Application for Probate of Will as Muniment of Title (Will Not Produced)
11.03	Order Admitting Will to Probate as Muniment of Title
11.04	Affidavit RE Fulfillment of Will Admitted to Probate as a Muniment of Title
11.05	Letter Advising of Muniment of Title Procedures
11.06	Letter Transmitting Documents to Complete Transfer of Securities
11.07	Letter Ordering Certified Copies – Muniment of Title
	Administration With Will Annexed

12.01	Application for Probate of Will and for Letters of Administration
12.02	Order Admitting Will to Probate and Granting Letters of Administration
12.03	Letter Advising Administrator Regarding Duties
	Heirship
13.01	Application to Determine Heirship
13.02	Motion to Appoint Attorney Ad Litem
13.03	Order Appointing Attorney Ad Litem
13.04	Letter Advising Attorney Ad Litem
13.05	Answer of Attorney Ad Litem
13.06	Affidavit Concerning Identity of Heirs (Sec. 203.002)
13.07	Certificate of Service of Citation
13.08	Judgment Declaring Heirship
13.09	Letter Ordering Certified Copies - Heirship
	Oaths
14.01	Oath of Administrator With Will Annexed
14.02	Oath of Administrator
14.03	Oath of Temporary Administrator
14.04	Oath of Executor
	Small Estate Affidavit
15.01	Small Estate Affidavit
15.02	Order on Small Estate Affidavit
15.03	Letter Transmitting Small Estate Affidavit to Witness
15.04	Letter Ordering Certified Copies of Small Estate Affidavit
15.05	Letter Transmitting Documents to Complete Transfer of Securities
	Waivers
16.01	Waiver of Notice and Consent to Ind. Admin. (Sec. 401.004)
16.02	Waiver of Appointment and Right to Letters Testamentary
16.03	Waiver of Appointment and Right to Letters of Administration
16.04	Waiver of Appointment and Right to Letters of Temporary Administration
16.05	Waiver of Appointment and Right to Letters of Administration With Will Annexed
16.06	Waiver of Right to Receive Inventory and Appraisement
16.07	Waiver by Beneficiary of Notice of Admission of Will (Chapter 308)
16.08	Waiver of Notice and Consent by Heir (Sec. 258.051 probate after 4 years)
	Inventory
17.01	Inventory, Appraisement and List of Claims
17.02	Order Approving Inventory, Appraisement and List of Claims
17.03	Affidavit in Lieu of Inventory, Appraisement and List of claims
17.04	Application for Extension of Time to File Inventory
17.05	Order on Application for Extension of Time to File Inventory
17.06	Supplemental Inventory
17.07	Letter Transmitting Inventory to Appraiser
	Notices to Creditors
18.01	Notice of Appointment by Newspaper Publication With Affidavit

18.02	Letter Transmitting Notice to Newspaper
18.03	Notice to Secured Creditors
18.04	Proof of Service of Notice to Secured Creditors
18.05	Notice to Comptroller
18.06	Notice to Property Tax Appraisal District
	Claims
19.01	Authenticated Unsecured Claim
19.02	Allowance of Claim
19.03	Memorandum of Allowance of Claim
19.04	Order Approving and Classifying Claim
19.05	[Partial] Rejection of Claim
19.06	Memorandum of [Partial] Rejection of Claim
19.07	Order [Partially] Disapproving Claim
	Check Returns
20.01	Returning Check to Social Security Administration
20.02	Returning Check to Department of Veteran Affairs
	Fees and Expenses
21.01	Application to Authorize Expenditure of Funds
21.02	Order Authorizing Expenditure of Funds
21.03	Application to Authorize Payment of Attorney's Fees and Expenses
21.04	Order Authorizing Payment of Attorney's Fees and Expenses
21.05	Application to Authorize Reimbursement
21.06	Order Authorizing Reimbursement
21.07	Application to Ratify Expenditure
21.08	Order Ratifying Expenditure
	Accountings
22.01	Annual Account
22.02	Account for Final Settlement
22.03	Certificate of Service on Account for Final Settlement
22.04	Order Approving Account Final Settlement and Authorizing Distribution of Estate
22.05	Letter Transmitting Account for Final Settlement to Client
	Common Probate Forms
23.01	Notice to Beneficiary
23.02	Affidavit of Notice to Beneficiaries by Personal Representative
23.03	Attorney's Certificate of Notice to Beneficiaries
23.04	Bond of Personal Representative (Person)
23.05	Bond of Personal Representative (Corporate)
	Miscellaneous Affidavits
24.01	Affidavit of Heir after Period for Probate
24.02	Affidavit of Domicile
24.03	Affidavit Regarding Debts and Taxes
24.04	Notice of Party's Current Address
24.05	Unsworn Declaration

24.06	Unsworn Declaration Jurat
	Witnesses, Proofs, Interrogatories and Depositions
25.01	Proof by Subscribing Witness
25.02	Proof of Decedent's Signature
25.03	Letter to Witness Regarding Death and Other Facts
25.04	Proof of Handwriting and Other Facts
25.05	Motion to Withdraw Purported Will
25.06	Order Authorizing Withdrawal of Purported Will
25.07	Receipt for Purported Will
25.08	Notice of Intention to Take Deposition Upon Written Questions
25.09	Direct Interrogatories to Subscribing Witness
25.10	Answers to Interrogatories by Subscribing Witness
25.11	Letter to Subscribing Witness Regarding Testimony
25.12	Direct Interrogatories to Handwriting and Signature Witness
25.13	Answers to Direct Interrogatories to Handwriting and Signature Witness
	IRS
26.01	IRS Form SS-4 – Application for Employer Id. Number
26.02	Letter Transmitting Form SS-4
26.03	IRS Form W-9 – Request for Taxpayer Id. Number
26.04	Letter Transmitting Form W-9
26.05	IRS Form 56 – Notice Concerning Fiduciary Relationship
26.06	Letter Transmitting Form 56
26.07	IRS Form 712 – Life Insurance Statement
26.08	Letter Transmitting Form 712
26.09	IRS Form 2848 – Power of Attorney and Declaration of Representative
26.10	Letter Transmitting Form 2848
26.11	IRS Form 4506 – Request for Copy of Tax Return
26.12	Letter Transmitting IRS Form 4506
26.13	IRS Form 4506-T – Request for Transcript of Tax Return
26.14	Letter Transmitting IRS Form 4506-T
26.15	IRS Form 4768 – Application for Extension of Time
26.16	Letter Transmitting IRS Form 4768
26.17	IRS Form 8821 – Tax Information Authorization
26.18	Letter Transmitting IRS Form 8821
26.19	IRS Form 8822 – Change of Address
26.20	Letter Transmitting IRS Form 8822
	Property Sales and Transfers
27.01	Application to Dispose of Personal Effects
27.02	Order Authorizing Disposal of Personal Effects
27.03	Application for Order Authorizing Sale of Personal Property
27.04	Order Authorizing Sale of Personal Property
27.05	Report of Sale of Personal Property
27.06	Order Confirming Sale of Personal Property
27.07	Application for Order of Sale of Real Property
27.08	Order of Sale of Real Property
27.09	Report of Sale of Real Property

27.10	Deed
27.11	Order Confirming Sale of Real Property
27.12	Application to Authorize Lease of Minerals
27.13	Order Authorizing Lease of Minerals
27.14	Irrevocable Stock Power
27.15	Irrevocable Bond Power
	Allowances and Exemptions
28.01	Application for Allowance in Lieu of Exempt Property
28.02	Order on Allowance in Lieu of Exempt Property
28.03	Application for Family Allowance
28.04	Order on Family Allowance
28.05	Application to Set Aside Exempt Property
28.06	Order to Set Aside Exempt Property
	Closing the Estate
29.01	Application to Close Estate and Discharge Personal Representative
29.02	Order Closing Estate and Discharging Personal Representative
29.03	Distributees Application to Close Administration
29.04	Order On Distributees Application to Close Administration
29.05	Closing Report for Independent Administration
	Letters to Heirs and Beneficiaries
30.01	Letter Notice to Beneficiary of Representation of Personal Representative
30.02	Letter Transmitting Inventory to Beneficiary
30.03	Letter Transmitting Insurance Benefits to Beneficiary
30.04	Letter Advising Beneficiary or Heir of Tax Basis
	General Forms
31.01	Disclaimer of Interest or Power
31.02	Appointment of Resident Agent
31.03	Receipt and Release
31.04	Receipt (Generic)
31.05	Letter Transmitting Verification of Funds on Deposit
31.06	Letter Transmitting Verification of Safekeeping
31.07	Suggestion of Death
31.08	Motion for Leave to Substitute Counsel
31.09	Order Granting Substitution of Counsel
31.10	Motion for Leave to Withdraw as Counsel
31.11	Order Granting Motion to Withdraw as Counsel
31.12	Motion for Leave to Withdraw and Substitute Counsel
31.13	Order Granting Motion to Withdraw and Substitute Counsel
	Local Forms
	Supplementary Probate Case Information Sheet (Travis County)