



# Norris Modern Probate

## Table of Contents

	<b>1. Client Communications</b>
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)
1.07	Letter Releasing Representation
1.08	Letter Confirming Nonengagement
1.09	Flat Fee Agreement
1.10	Hourly Fee Agreement
	<b>2. Opening the Estate</b>
2.01	Civil Case Information Sheet
2.02	Probate of Will Intake Sheet
	Probate of Will Intake Worksheet – blank form
2.03	Intestate Intake Sheet
	Intestate Intake Worksheet – blank form
2.04	Probate Inventory Worksheet – blank form
	<b>3. Letters to County Clerk</b>
3.01	Letter to County Clerk in County of Probate
3.02	Letter to Other County Clerk
3.03	Letter – File Will Following Application
3.04	Letter – File Will Without Application
3.05	Letter – Documents to Be Signed by Probate Judge
3.08	Letter Ordering Letters Testamentary or Letters of Administration
3.09	Letter Ordering Certified Copies – Independent Administration
3.10	Letter Ordering Certified Copies – Independent Administration by Agreement
3.11	Letter Ordering Certified Copies – Independent Administration Intestate
3.12	Letter Ordering Certified Copies – Dependent Administration Testate
3.13	Letter Ordering Certified Copies – Dependent Administration
3.14	Letter Ordering Certified Copies – Muniment of Title
3.15	Letter Ordering Certified Copies – Administration With Will Annexed
3.16	Letter Ordering Certified Copies – Heirship
3.17	Letter Ordering Certified Copies – Ancillary Probate
3.18	Letter Ordering Certified Copies – Probated in Another State or County
3.19	Letter Ordering Certified Copies – Small Estate Affidavit
3.20	Letter – Record Distribution Deed
3.21	Letter – Record Will Previously Probated in Another State or County
	<b>4. Actions Before Probate</b>
4.01	Application to Examine Contents of Safe Deposit Box
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
4.07	Letter – Turnover of Will Demand
4.08	Motion to Show Cause to Deliver Will
4.09	Order to Show Cause
4.10	Order Granting Motion to Deliver Will
	<b>5. Information Gathering</b>
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 Insurance Agent
5.08	Life Insurance Policy Excluded from Decedent’s Gross Estate - Letter
5.09	Letter – Insurance on Life of Another
5.10	Letter to Creditor Requesting Information About Debt
5.11	Letter Ordering Death Certificates
5.12	Letter to Employer Regarding Employment and Death Benefits
5.15	Letter – Inquiries as to Accounts of Decedent
5.20	Application for Disclosure of Digital Assets (Sec. 351.106)
5.21	Order for Disclosure of Digital Assets (Sec 351.106)
5.22	Letter – Request Concerning Digital Assets
5.23	Request for Texas Motor Vehicle Information
5.24	Letter – MERP Form to Heir for Signature (Medical)
5.25	Texas MERP Authorization and Certification
5.26	Letter – MERP Authorization to Agency (Medical)
5.27	Letter – Dividend Reinvestment Program
5.28	Letter – Terminate Brokerage Accounts
5.29	Application for Access to Financial Records (Sec. 153.003)
5.30	Order for Access to Financial Records (Sec. 153.003)
	<b>6. Independent Administration (Testate)</b>
6.01	Application for Probate of Will – Independent Executor (Sec. 401.001)
6.02	Order Admitting Will to Probate (Sec. 401.001)
6.03	Application for Probate of Will – Ind. Admin by Agreement (Sec. 401.002a)
6.04	Order Admitting Will to Probate (Sec. 401.002a)
6.05	Application for Probate of Will Ind. Administrator by Agreement (Sec. 401.002b)
6.06	Order Admitting Will to Probate (Sec. 401.002b)
6.07	Application for Probate of Will – Designated Administrator (Sec. 254.006)
6.08	Order Admitting Will to Probate (Sec. 254.006)
6.09	Application for Appointment of Successor Independent Executor
6.10	Order Appointing Successor Independent Executor
6.11	Application for Probate – Post Muniment Conversion (Sec. 257.151)
6.12	Order Appointing Independent [Executor-Administrator] (Sec. 257.151)
6.13	Letter Advising Independent Executor Regarding Duties

6.14	Letter Advising Independent Administrator Regarding Duties
	<b>7. Dependent Administration (Testate)</b>
7.01	Application for Probate of Will and for Letters Testamentary (Dependent)
7.02	Order Admitting Will to Probate and Granting Letters Testamentary
7.03	Letter Advising Dependent Executor Regarding Duties
7.04	Order Appointing Successor Executor (Dependent)
7.05	Letter Advising Dependent Executor Regarding Duties
	<b>8. Administration (Intestate)</b>
8.01	Application for Letters of Dependent Administration (Intestate)
8.02	Order Granting Letters of Dependent Administration (Intestate)
8.03	Combined Application to Determine Heirship Letters of Administration (Intestate)
8.04	Judgment Determining Heirship and Granting Letters of Administration (Intestate)
8.05	Combined Application to Determine Heirship & Letters of Indep. Admin (Intestate)
8.06	Judgment Determining Heirship & Granting Letters of Indep. Admin. (Intestate)
8.07	Application for Letters of Indep. Admin. by Agreement (Sec 401.003) (Intestate)
8.08	Order Granting Letters of Independent Administration (Intestate)
8.09	Application for Appointment of Successor Independent Administrator (Intestate)
8.10	Order Appointing Successor Administrator (Intestate)
8.11	Letter Advising Independent Administrator Regarding Duties (Intestate)
8.12	Letter Advising Dependent Administrator Regarding Duties (Intestate)
8.13	Statement of Facts (Intestate)
	<b>9. Temporary Administration</b>
9.01	Application for Temporary Administration
9.02	Order Appointing Temporary Administrator
9.03	Letters of Temporary Administration
9.04	Letter Notice of Appointment of Temporary Administrator
9.05	Application to Enlarge Powers of Temporary Administrator
9.06	Order Enlarging Powers of Temporary Administrator
9.07	Order Making Temporary Administration Permanent
9.08	Final Accounting of Temporary Administrator
9.09	Order Approving Final Accounting of Temporary Administrator
9.10	Application to Close Temporary Administration
9.11	Order Closing Temporary Administration
	<b>10. Muniment of Title</b>
10.01	Application for Probate of Will as Muniment of Title
10.02	Application for Probate of Will as Muniment of Title (Will Not Produced)
10.03	Order Admitting Will to Probate as Muniment of Title
10.04	Affidavit RE Fulfillment of Will Admitted to Probate as a Muniment of Title
10.05	Letter Advising of Muniment of Title Procedures
10.06	Letter Transmitting Documents to Complete Transfer of Securities - MT
	<b>11. Administration With Will Annexed</b>
11.01	Application for Probate of Will and for Letters of Administration
11.02	Order Admitting Will to Probate and Granting Letters of Administration
11.03	Letter Advising Administrator Regarding Duties

	<b>12. Heirship</b>
12.01	Application to Determine Heirship
12.02	Affidavit Concerning Identity of Heirs (for filing in real property records)
12.03	Affidavit Concerning Identity of Heirs (for heirship proceeding)
12.04	Letter - Citation to Newspaper
12.05	Certificate of Service of Citation
12.06	Affidavit of Service of Citation
12.07	Judgment Declaring Heirship
12.08	Disclaimer to Heir or Beneficiary - Letter
12.09	Disclaimer of Interest or Power
12.10	Copy Disclaimer to Executor or Administrator – Letter
	<b>13. Ad Litem</b>
13.01	Motion to Appoint Attorney Ad Litem
13.02	Order Appointing Attorney Ad Litem
13.03	Letter Advising Attorney Ad Litem
13.04	Answer of Attorney Ad Litem
13.05	Report of Attorney Ad Litem
13.06	Initial Disclosures
	<b>14. Ancillary Probate</b>
14.01	Distributee's Agreement for Ancillary Independent Administration
14.02	Application for Ancillary Probate of Foreign Will-Issuance Letters Testamentary
14.03	Order - Application Ancillary Probate Foreign Will Issuance Letters Testate
	<b>15. Proofs of Death and Other Facts</b>
15.01	Proof of Death and Other Facts (Testate)
15.02	Prove up Questions (Testate)
15.03	Proof of Death and Other Facts (Intestate)
15.04	Prove up Questions (Intestate)
15.05	Proof of Death and Other Facts (Temporary Administration)
15.06	Prove up Questions (Temporary Administration)
15.07	Proof of Death and Other Facts (Muniment of Title)
15.08	Prove up Questions (Muniment of Title)
15.09	Proof of Death and Other Facts (Post Muniment Conversion)
15.10	Prove up Questions (Post Muniment Conversion)
	<b>16. Oaths</b>
16.01	Oath of [Independent] Executor
16.02	Oath of [Independent] Administrator
16.03	Oath of Temporary Administrator
16.04	Oath of Administrator With Will Annexed
16.05	Letter – Oath to Executor(s)
16.06	Letter – Oath to Administrator
	<b>17. Small Estate Affidavit</b>
17.01	Small Estate Affidavit
17.02	Order on Small Estate Affidavit

17.03	Letter Transmitting Small Estate Affidavit to Witness
17.04	Letter Transmitting Small Estate Affidavit to Heir or Distributee
17.05	Letter Transmitting Documents to Complete Transfer of Securities - SEA
	<b>18. Waivers</b>
18.01	Waiver of Notice and Consent to Ind. Admin. (Sec. 401.004)
18.02	Waiver by Beneficiary of Notice of Admission of Will (Ch. 308)
18.03	Waiver of Notice and Consent by Heir - Probate After 4 Years (Sec. 258.051)
18.04	Waiver of Notice and Citation - Will Not Produced in Court
18.05	Waiver of Notice (Sec. 202.056)
18.06	Waiver of Right to Receive Inventory and Appraisement
18.07	Waiver of Appointment and Right to Letters Testamentary
18.08	Waiver of Appointment and Right to Letters of Administration
18.09	Waiver of Appointment and Right to Letters of Temporary Administration
18.10	Waiver of Appointment and Right to Letters of Administration With Will Annexed
18.11	Waiver of Letters Testamentary in Favor of Muniment of Title
18.12	Assignment of Interest
18.13	Waiver of De Novo Hearing
	<b>19. Inventory</b>
19.01	Inventory, Appraisement and List of Claims
19.02	Order Approving Inventory, Appraisement and List of Claims
19.03	Affidavit in Lieu of Inventory, Appraisement and List of Claims
19.04	Application for Extension of Time to File Inventory
19.05	Order on Application for Extension of Time to File Inventory
19.06	Supplemental Inventory
19.07	Letter Transmitting Inventory to Appraiser
	<b>20. Notices to Creditors</b>
20.01	Notice of Appointment by Newspaper Publication With Affidavit
20.02	Letter Transmitting Notice to Newspaper
20.03	Notice to Secured Creditors
20.04	Proof of Service of Notice to Secured Creditors
20.05	Permissive Notice to Unsecured Creditor
20.06	Notice to Comptroller
20.07	Notice to Property Tax Appraisal District
20.08	Letter - Claim Form to Creditor
	<b>21. Claims</b>
21.01	Authenticated Unsecured Claim
21.02	Allowance of Claim
21.03	Memorandum of Allowance of Claim
21.04	Order Approving and Classifying Claim
21.05	[Partial] Rejection of Claim
21.06	Memorandum of [Partial] Rejection of Claim
21.07	Order [Partially] Disapproving Claim
21.08	Letter - Advise Not to Allow Claim
21.09	Response to Attempt to Collect Deficiency
21.10	Letter - Unclaimed Funds to Comptroller

	<b>22. Check Returns</b>
22.01	Returning Check to Social Security Administration
22.02	Returning Check to Department of Veteran Affairs
	<b>23. Fees and Expenses</b>
23.01	Application to Authorize Expenditure of Funds
23.02	Order Authorizing Expenditure of Funds
23.03	Application to Authorize Payment of Attorney's Fees and Expenses
23.04	Order Authorizing Payment of Attorney's Fees and Expenses
23.05	Application to Authorize Reimbursement
23.06	Order Authorizing Reimbursement
23.07	Application to Ratify Expenditure
23.08	Order Ratifying Expenditure
23.10	Attorney's Fee Affidavit
	<b>24. Accountings</b>
24.01	Annual Account
24.02	Order Approving Annual Account
24.03	Affidavit of Dependent Administrator on Annual Account
24.04	Account for Final Settlement
24.05	Certificate of Compliance for Service of Citation (Final Settlement)
24.06	Order Approving Account Final Settlement and Authorizing Distribution of Estate
24.07	Letter Transmitting Account for Final Settlement to Client
24.08	Affidavit of Service of Citation (Final Account)
24.09	Certificate of Service of Citation (Final Account)
24.10	Letter - Copy of Account to Surety
24.11	Letter - Discharge of Surety
	<b>25. Common Probate Forms</b>
25.01	Notice to Beneficiary
25.02	Affidavit of Compliance for Notice to Beneficiaries by Personal Representative
25.03	Attorney's Certificate of Compliance for Notice to Beneficiaries
25.04	Bond of Personal Representative (Person)
25.05	Bond of Personal Representative (Corporate)
	<b>26. Miscellaneous Affidavits and Declarations</b>
26.01	Affidavit of Heir After Period for Probate
26.02	Affidavit of Domicile
26.03	Affidavit Regarding Debts and Taxes
26.04	Affidavit of No Debts
26.05	Notice of Party's Current Address
26.06	Unsworn Declaration
26.07	Unsworn Declaration Jurat
26.08	Affidavit of Heirship for Motor Vehicle
26.09	Affidavit of Death
26.11	Verification for Probate Application
	<b>27. Witnesses, Proofs, Interrogatories and Depositions</b>

27.01	Proof by Subscribing Witness
27.02	Proof of Decedent's Signature
27.03	Letter to Witness Regarding Death and Other Facts
27.04	Proof of Handwriting and Other Facts
27.05	Motion for Alternative Method of Proof of Will
27.06	Order on Motion for Alternative Method of Proof of Will
27.07	Motion to Withdraw Purported Will
27.08	Order Authorizing Withdrawal of Purported Will
27.09	Receipt for Purported Will
27.10	Notice of Intention to Take Deposition Upon Written Questions
27.11	Direct Interrogatories to Subscribing Witness
27.12	Answers to Interrogatories by Subscribing Witness
27.13	Interrogatories to Witness - Letter
27.14	Letter to Subscribing Witness Regarding Testimony
27.15	Direct Interrogatories to Handwriting and Signature Witness
27.16	Answers to Direct Interrogatories to Handwriting and Signature Witness
27.17	Proof of Subscribing Witness's Signature
27.18	Letter Thanking Witness for Appearing in Court
	<b>28. IRS</b>
28.01	IRS Form SS-4 – Application for Employer Id. Number
28.02	Letter Transmitting Form SS-4
28.03	IRS Form W-9 – Request for Taxpayer Id. Number
28.04	Letter Transmitting Form W-9
28.05	IRS Form 56 – Notice Concerning Fiduciary Relationship
28.06	Letter Transmitting Form 56
28.07	IRS Form 712 – Life Insurance Statement
28.08	Letter Transmitting Form 712
28.09	IRS Form 2848 – Power of Attorney and Declaration of Representative
28.10	Letter Transmitting Form 2848
28.11	IRS Form 4506 – Request for Copy of Tax Return
28.12	Letter Transmitting IRS Form 4506
28.13	IRS Form 4506-T – Request for Transcript of Tax Return
28.14	Letter Transmitting IRS Form 4506-T
28.15	IRS Form 4768 – Application for Extension of Time
28.16	Letter Transmitting IRS Form 4768
28.17	IRS Form 8821 – Tax Information Authorization
28.18	Letter Transmitting IRS Form 8821
28.19	IRS Form 8822 – Change of Address
28.20	Letter Transmitting IRS Form 8822
	<b>29. Property Sales and Transfers</b>
29.01	Application to Dispose of Personal Effects
29.02	Order Authorizing Disposal of Personal Effects
29.03	Application for Order Authorizing Sale of Personal Property
29.04	Order Authorizing Sale of Personal Property
29.05	Report of Sale of Personal Property
29.06	Order Approving Sale of Personal Property
29.07	Report of Contract for Sale of Personal Property

29.08	Order Confirming Sale of Personal Property
29.09	Application for Order of Sale of Real Property
29.10	Order of Sale of Real Property
29.11	Report of Sale of Real Property
29.12	Deed
29.13	Order Approving Sale of Real Property
29.14	Report of Contract for Sale of Real Property
29.15	Order Confirming Sale of Real Property
29.16	Application to Authorize Lease of Minerals
29.17	Order Authorizing Lease of Minerals
29.18	Irrevocable Stock Power
29.19	Irrevocable Bond Power
29.20	Application to Set Aside Report of Sale and Order Approving Sale
29.21	Order to Set Aside Order Approving Sale of Real Property
29.22	Application to Set Aside Order Confirming Sale of Real Property
29.23	Order to Set Aside Order Confirming Sale of Real Property
29.24	Distribution Deed
29.25	Verified Exhibit Showing Condition of the Estate
29.26	Application to Mortgage Minor's Interest
29.28	Application to Sell Minor's Interest in Property
29.29	Order Authorizing Sale of Minor's Interest in Property
29.30	Agreement Concerning Deposits
	<b>30. Securities</b>
30.01	Letter - Change of Address for Securities
30.02	Letter - Valuation of Securities
30.03	Letter - Transfer of Securities (all but Small Estate and Muniment of Title)
30.04	Letter - Securities to Transferee
	<b>31. Allowances and Exemptions</b>
31.01	Application for Allowance in Lieu of Exempt Property
31.02	Order on Allowance in Lieu of Exempt Property
31.03	Application for Family Allowance
31.04	Order on Family Allowance
31.05	Application to Set Aside Exempt Property
31.06	Order to Set Aside Exempt Property
	<b>32. Closing the Estate</b>
32.01	Application to Close Estate and Discharge Personal Representative
32.02	Order Closing Estate and Discharging Personal Representative
32.03	Distributees Application to Close Administration
32.04	Order on Distributees Application to Close Administration
32.05	Closing Report for Independent Administration
	<b>33. Letters to Heirs and Beneficiaries</b>
33.01	Letter Notice to Beneficiary of Representation of Personal Representative
33.02	Letter Transmitting Inventory to Beneficiary
33.03	Letter Transmitting Insurance Benefits to Beneficiary
33.04	Letter Advising Beneficiary or Heir of Tax Basis



33.05	Letter Forwarding Distribution to Heirs and Beneficiaries
	<b>34. General Forms</b>
34.01	Appointment of Resident Agent
34.02	Appointment of Resident Agent - Letter
34.03	Receipt and Release
34.04	Receipt (Generic)
34.05	Suggestion of Death
34.06	Motion for Leave to Substitute Counsel
34.07	Order Granting Substitution of Counsel
34.08	Motion for Leave to Withdraw as Counsel
34.09	Order Granting Motion to Withdraw as Counsel
34.10	Motion for Leave to Withdraw and Substitute Counsel
34.11	Order Granting Motion to Withdraw and Substitute Counsel
34.12	Application for Authority to Engage-Employ
34.13	Order for Authority to Engage-Employ
34.14	Application to Deposit Funds Into Registry
34.15	Order to Deposit Funds Into Registry
34.16	Application to Make Partial Distribution of Estate Assets
34.17	Order to Make Partial Distribution of Estate Assets
34.18	Application to Withdraw Funds to Pay Comptroller
34.19	Order to Withdraw Funds to Pay Comptroller
34.21	Chapter 456 Agreement Regarding Decedents Trust and Escrow Account
34.22	Chapter 456 Statement Regarding Decedents Trust and Escrow Account
34.23	Order for Substitution of Redacted Copy of E-filed Will
34.24	Order for Substitution of Redacted Copy of Inventory and Appraisement
34.25	Amendment or Supplement to Pleading in Open Court
34.26	Motion for Service by Publication - Will Not Produced
34.27	Order for Service by Publication
34.28	Notice of In-Person Court Proceeding (Notice of Hearing)
34.29	Notice of Remote Court Proceeding (Notice of Hearing)
34.30	Motion for Zoom Hearing
34.31	Order on Motion for Zoom Hearing
34.32	Motion to Transfer Proceeding
34.33	Order Granting Transfer of Proceeding
34.34	Shell Motion
34.35	Shell Order
	<b>35. Miscellaneous Letters</b>
35.01	Letter Transmitting Verification of Funds on Deposit
35.02	Letter Transmitting Verification of Safekeeping
35.03	Collect Insurance Benefits
35.04	Cancel Credit Cards and Charge Accounts
35.05	Change Records at Central Appraisal District
35.06	Advise Applicant, Executor, or Administrator of Hearing - Letter
35.07	Document to Be Signed by Executor, Administrator, or Client - Letter
35.08	Letter Advising of Portability Election
35.09	Letter to Institution Holding Decedent's Trust or Escrow Account
35.10	Notify Tenant for Future Payments



## Probate – Local Forms Table of Contents

	<b>Bexar County</b>
	Pink Sheet – Order to Pay
	<b>Dallas County</b>
	Appointment of Resident Agent
	Receipt and Waiver of Notice
	<b>Harris County</b>
	Order and Approval of Judge for Affidavit of Distributees – Small Estate
	Order for Payment of Appointee Fees
	<b>Tarrant County</b>
	Order Recording Authorization of Court-Appointee Fees
	<b>Travis County</b>
	Supplementary Probate Case Information Sheet (Travis)
	Order for Payment of Appointee Fees (Travis)