



HEIRSHIP TREE

When used in combination with the **Intestate/Heirship intake questionnaire** (found in *Online Intake under the Probate practice area*), the Heirship Tree simplifies the development of a family tree, providing automatic calculations of each heir's interest in the estate.

You'll encounter it during Document Assembly and can access it as a standalone tool.

The screenshot displays the 'Probate Family Tree' application window. The main area shows a 'Heirship Tree of Decedent' with a central 'Decedent' node (D) connected to 'Father of Decedent' (F) and 'Mother of Decedent' (M). Below the decedent are three child nodes: 'Surviving Spouse' (SS), 'Divorced Spouse' (EX), '1st Child of Decedent' (C), '2nd Child of Decedent' (C), and 'Child from 1st Marriage' (C). A red dashed line connects the 'Surviving Spouse' node to the 'Surviving Spouse' form on the right. The form includes fields for Name, Status of Marriage (radio buttons for Surviving spouse, Marriage Dissolved, Death of this spouse ended marriage), Address, City, County, State, Zip, Date of marriage, Place of marriage, Date of death, Date of dissolution, and Place of death. At the bottom, there are buttons for 'Add CHILD - Current Spouse...', 'Add Parent', 'Add Spouse', and 'Delete Current Spouse'. A 'Zoom' slider and 'Save & close', 'Cancel', 'Help', and 'Print Tree' buttons are also visible.

Key Benefits

- Clients provide family details online, at their own pace
- Information flows directly into a structured tree
- Every heir is organized in one clear view
- Allows for unlimited across up to 6 generations
- Equipped to account for half-siblings, predeceased heirs, and post-deceased heirs
- Shares are calculated automatically—with an audit available to demonstrate calculations
- Information flows directly into your documents
- Generate a clean, court-ready visual in seconds

WHERE YOU'LL FIND THE HEIRSHIP TREE

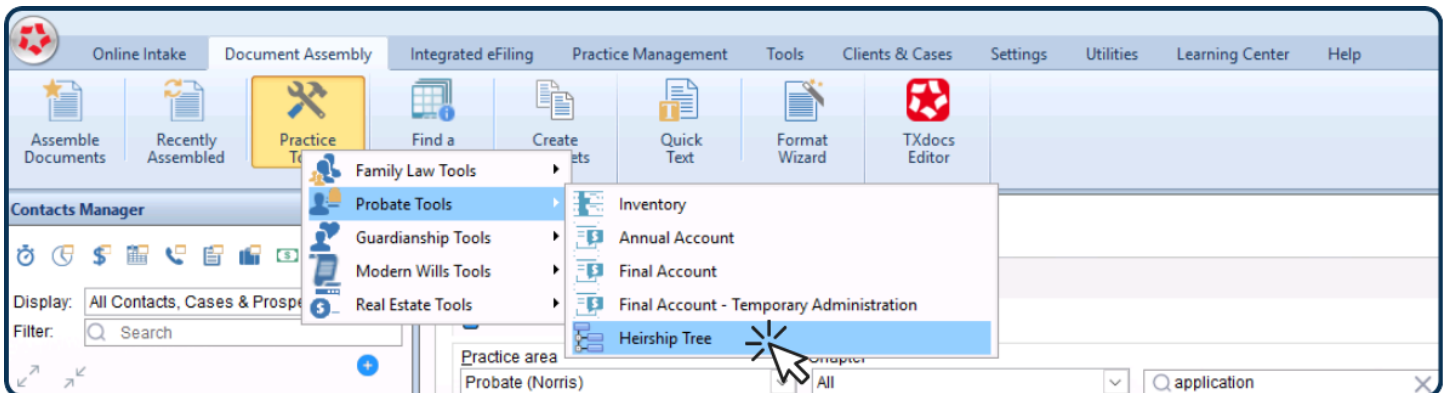
Document Assembly

The Heirship Tree is presented during the assembly of 27 form templates.

- assembled intakes
- applications, orders and proofs for heirship proceedings
- applications to probate a will when enhanced requirements are needed
- small estate affidavits
- ad litem reports
- and more

Standalone Tool

The Heirship Tree tool is accessible anytime you need to work with your clients' family information. You'll find it in the **Probate Practice Tools**, found in the 'Document Assembly' and 'Tools' tabs.



NEXT STEPS

- 1 Send clients the Intestate/Heirship Online Intake questionnaire and let them fill out the details
- 2 Download the completed information to TXdocs
- 3 Put the data to immediate work during assembly, or use the Heirship Tree tool to review & refine

OUR EXPERT TEAM IS AVAILABLE TO ANSWER YOUR QUESTIONS

Go to <https://bit.ly/3PuYWGP> to schedule a customized walkthrough via Zoom,
email us at service@txdocs.com
or call (210) 253-9506