



Client Information

Worksheet

SECTION I. INFORMATION ABOUT THE APPLICANT

1. Your full legal name:

First

Middle

Last

2. Your name as in the Will:

First

Middle

Last

3. Your residence address:

Street

City, State & Zip Code

Best Phone Number

4. Your E-Mail Address:

E-Mail Address

5. Your relationship to Decedent:

Relationship

Your Drivers License Number _____

and Social Security Number _____

SECTION II. INFORMATION ABOUT THE DECEDENT

6. Decedent's name as in the Will: _____
First Middle Last

7. Name variations on accounts: _____

8. Decedent's date of birth: _____

9. Decedent's date of death: _____ Age: _____

10. Location of Decedent's death: _____
City, State County

11. Decedent's residence at death: _____
Street County
City, State & Zip Code

12. List **ALL** of Decedent's marriages:

Current Spouse's Full Name	Date of Marriage	
_____	_____	_____ / Death
Prior Spouse's Full Name	Date of Marriage	Date of Divorce / Death
_____	_____	_____ / Death
Prior Spouse's Full Name	Date of Marriage	Date of Divorce / Death
_____	_____	_____ / Death

Decedent's Social Security Number: _____ and Driver's License Number: _____

SECTION III. INFORMATION REGARDING THE DECEDENT'S WILL

13. What is the date of the Decedent's Will? _____

14. Is the Will "self-proved"? See below. Yes No

A self-proved will contains notarized language at the end of the Will that is nearly identical to the following:

Before me, the undersigned authority, on this day personally appeared [Decedent’s Name], [Witness#1] and [Witness#2], known to me to be the testator and the witnesses, respectively, whose names are subscribed to the annexed or foregoing instrument in their respective capacities, and, all of said persons being by me duly sworn, the said [Decedent’s Name], testator, declared to me and to the said witnesses in my presence that said instrument is his last will and testament, and that he had willingly made and executed it as his free act and deed; and the said witnesses, each on his oath stated to me, in the presence and hearing of the said testator, that the said testator....

15. Please provide the names to the witnesses to the Will:

_____	_____	_____	_____	_____	_____
Witness #1 First Name	Middle	Last Name	Witness #2 First Name	Middle	Last Name

16. Do you have any way of contacting the witnesses to the Will? Yes No

17. Did the Decedent have or adopt any children after executing the Will? Yes No

18. Was the Decedent divorced after the date of the Will? Yes No

19. Does the Decedent’s Will name someone to serve as “Independent” Executor or Executrix? Yes No

20. Does the Decedent’s Will say that the “Independent” Executor will serve “without bond”? Yes No

21. Executors’ Names: 1 _____ 2 _____ 3 _____

Residences: _____

Street	Street	Street
_____	_____	_____
City, State & Zip Code	City, State & Zip Code	City, State & Zip Code

22. Will any of the Executors be waiving their right to serve? Yes No

23. Has any named Executor ever been convicted of a felony? Yes No

24. Are all named Executors Texas residents?

Yes No

25. Does the Decedent's Will name the State of Texas, a governmental agency of the State of Texas, or a charitable organization as a devisee?

Yes No

SECTION IV. INFORMATION REGARDING DECEDENT'S HEIRS

26. The Texas Estates Code requires personal representatives to give notice to all will beneficiaries within sixty days of the date a decedent's will is probated. Therefore, please provide the following information for **ALL** persons named as beneficiaries in the Decedent's Last Will and Testament:

a.	_____	Deceased?	Yes	No
	Full Name			
	_____			_____
	Street			Date of Death

	City, State & Zip Code			
b.	_____	Deceased?	Yes	No
	Full Name			
	_____			_____
	Street			Date of Death

	City, State & Zip Code			
c.	_____	Deceased?	Yes	No
	Full Name			
	_____			_____
	Street			Date of Death

	City, State & Zip Code			
d.	_____	Deceased?	Yes	No
	Full Name			
	_____			_____
	Street			Date of Death

	City, State & Zip Code			
e.	_____	Deceased?	Yes	No
	Full Name			
	_____			_____
	Street			Date of Death

	City, State & Zip Code			

f.	_____	Deceased?	Yes	No
	Full Name			
	_____			_____
	Street			Date of Death

	City, State & Zip Code			

27. Do all of the persons named in the Will and all of the Decedent's immediate family members not named in the Will agree as to the validity of the Decedent's Last Will and Testament and to your serving as the Executor of the Estate?	Yes	No
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SECTION V. INFORMATION FOR THE INVENTORY, APPRAISEMENT AND LIST OF CLAIMS

28. Description of Decedent's Assets (Do not include "JTWROS", "POD" or other assets that transfer automatically upon the death of the Decedent.)

a.	_____	\$	_____		
	Homestead Address		Appraisal District Tax Valuation		
	_____		_____		
	City, State & Zip Code		Date of Purchase (Month/Year)		
	_____	\$	_____	Community Property	Yes No
	Mortgages, Deed of Trust, or Lien holder's Name		Amount of Lien	<i>See definition below.</i>	
b.	_____	\$	_____		
	Other Real Property Address		Appraisal District Tax Valuation (See "www.dcad.org")		
	_____		_____		
	City, State & Zip Code		Date of Purchase (Month/Year)		
	_____	\$	_____	Community Property	Yes No
	Mortgages, Deed of Trust, or Lien holder's Name		Amount of Lien	<i>See definition below.</i>	
c.	_____	\$	_____		
	Automobile Make & Model		Estimated "Blue Book" Value (See "www.kbb.com")		
	_____		_____		
	VIN Number (Required)		_____	Community Property	Yes No
	_____	\$	_____	<i>See definition below.</i>	
	Lien holder's Name		Amount of Lien		
d.	_____	\$	_____		
	Bank/Investment Company Name		Account Value (as of the Date of Death)		
	X _____		Savings	Checking	Investment
	Last Four Digits of Account Number		_____	Community Property	Yes No
	_____		_____	<i>See definition below.</i>	
	Bank Address				

	City, State & Zip Code				

e. _____
Bank/Investment Company Name

X _____
 Last Four Digits of Account Number

 Bank Address

 City, State & Zip Code

\$ _____
 Account Value (as of the Date of Death)

Savings	Checking	Investment
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Community Property Yes No
See definition below.

Community property consists of the property, other than separate property, acquired by either spouse during marriage. A spouse's separate property consists of: 1) the property owned or claimed by the spouse before marriage; 2) the property acquired by the spouse during marriage by gift or inheritance; and 3) the recovery for personal injuries sustained by the spouse during marriage, except any recovery for loss of earning capacity during marriage. All property that is acquired during the marriage is presumed to be community property unless proven otherwise.

f. _____
Life Insurance Payable to the Estate

 Policy Number

 Insurance Company Address

 City, State & Zip Code

\$ _____
 Face Value of Policy

Community Property	Yes	No
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See definition below.

g. Furniture and Furnishings of residence:

\$ _____
 Estimated "Fair Market Value" of Property
 (i.e. the price you would get if sold at an estate sale).

Community Property	Yes	No
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See definition on previous page.

h. Misc. personal effects, jewelry, clothing, etc.:

\$ _____
 Estimated Fair Market Value of Property
 (i.e. the price you would get if sold at an estate sale).

Community Property	Yes	No
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See definition on previous page.

SECTION VI. INFORMATION REGARDING DECEDENT'S DEBTS

29. Description of Decedent's Debts:

a.	_____	\$	_____
	Name of person who paid for funeral		Costs
b.	_____	\$	_____
	Healthcare Provider		Total Expenses NOT Covered by Insurance
c.	_____	\$	_____
	Credit Card Company		Total Unpaid Credit Card Balance
d.	_____	\$	_____
	Utility Company Name		Total Unpaid Balance
e.	_____	\$	_____
	Phone Company Name		Total Unpaid Balance

30. Would you be willing to immediately pay all of the Estate's outstanding debts in order to probate the Will as a muniment of title only? Yes No

A muniment of title proceeding is a simplified probate wherein the court does not appoint an executor because no administration is necessary. The court's Order Admitting Will to Probate gives the Will legal effect and constitutes sufficient legal authority to all persons to pay or transfer estate property to the persons described in the Will as the beneficiaries of the property. Most financial institutions, however, insist on only releasing estate funds to a court-appointed executor by requiring "Letters Testamentary" or "Letters of Administration" prior to releasing funds. In that event you have no choice but to ask the court to appoint an executor.

CONTACT PERSONS

Name

Phone number

Email address

Street

City, State & Zip Code

Name

Phone number

Email address

Street

City, State & Zip Code