Prospective Client Via e-Delivery

RE: Prospective Client Information Worksheet for Probate of Will

Dear Prospective Client,

Thank you for contacting the Chris Law Office (“***ChrisLaw***”) regarding the probate of the Last Will and Testament of your deceased loved-one. One of the first steps in the process is the filing of an Application for Probate with the Probate Court. In order to draft the Application, I need some basic information about you (the “Applicant”) and the Decedent. By completing this form and emailing it (along with a copy of the Will) to ChrisLaw, you make it possible for the Firm to prepare the Application and have it ready for your signature at our initial meeting.

The form contains almost all of the information that we will need to complete your case. Though it may be a lot of work up front, we ask that you make every effort to answer every question asked as it will make the rest of your case easier. If you do not know the answer then please indicate that on the form.

Please understand that the ChrisLaw’s receipt of this Worksheet does not establish an attorney-client relationship. The ChrisLaw will require pre-payment of its fees and the execution of an attorney-client fee agreement prior to accepting you as a client. While we generally work on an hourly rate, there are While we normally work on an hourly rate basis, there may be certain scenarios where a fixed fee is possible, Furthermore, the attorney’s fee is usually reimbursable from the Estate of the Decedent.

We do, however, look forward to working for you.

Sincerely,

Brett A. Christiansen

**Brett A. Christiansen**

Managing Principal

# Probate With a Will

# Client Information Worksheet

**Section I. Information about the Applicant**

1. Your full legal name:

First Middle Last

1. Your name as in the Will:

First Middle Last

1. 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 |

# Section II. Information about the Decedent

1. Decedent’s name as in the Will:

First Middle Last

1. 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 |  |

1. List **ALL** of Decedent’s marriages:

Current Spouse’s Full Name Date of Marriage

-

✔

Prior Spouse’s Full Name Date of Marriage Date of Divorce / Death

-

Prior Spouse’s Full Name Date of Marriage Date of Divorce / Death

# Section III. Information Regarding the Decedent’s Will

1. What is the date of the Decedent’s Will?
2. 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….*

For a full explanation go to our website: <http://duranfirm.com/section_59.php>

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

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

1. Do you have any way of contacting the witnesses to the Will? Yes No
2. Did the Decedent have or adopt any children after executing the Will? Yes No
3. Was the Decedent divorced after the date of the Will? Yes No
4. Does the Decedent’s Will name someone to Yes No serve as “*Independent*” Executor or Executrix?
5. Does the Decedent’s Will say that the “Independent” Yes No Executor will serve “without bond”?
6. 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

1. 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. | | Full Name | Deceased? | Yes | No |
|  | | Street |  | Date of Death |  |
|  | | City, State & Zip Code |  |  |  |
| b. | | Full Name | Deceased? | Yes | No |
|  | | Street |  | Date of Death |  |
|  | | City, State & Zip Code |  |  |  |
| c. | | Full Name | Deceased? | Yes | No |
|  | | Street |  | Date of Death |  |
|  | | City, State & Zip Code |  |  |  |
| d. | | Full Name | Deceased? | Yes | No |
|  | | Street |  | Date of Death |  |
|  | | City, State & Zip Code |  |  |  |
| e. | | Full Name | Deceased? | Yes | No |
|  | | Street |  | Date of Death |  |
|  | | City, State & Zip Code |  |  |  |
| f. | | Full Name | Deceased? | Yes | No |
|  | | Street |  | Date of Death |  |
| City, State & Zip Code  *Continue on back if necessary*. | | | | | |
| 27. | Do all of the persons named in the Will and all of the | | | Yes | No |
|  | 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? | | |  |  |

# Section V. Information for the Inventory, Appraisement and List of Claims

* 1. 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 (*See* “[www.dcad.org](http://www.dcad.org/)”) |  |
|  | City, State & Zip Code | /  Date of Purchase (Month/Year) |  |
|  | $  Mortgages, Deed of Trust, or Lien holder’s Name Amount of Lien | Community Property Yes  *See definition below.* | No |

|  |  |  |  |
| --- | --- | --- | --- |
| b. | **Other Real Property Address** | $  Appraisal District Tax Valuation (*See* “[www.dcad.org](http://www.dcad.org/)”) |  |
|  | City, State & Zip Code | /  Date of Purchase (Month/Year) |  |
|  | $  Mortgages, Deed of Trust, or Lien holder’s Name Amount of Lien | Community Property Yes  *See definition below.* | No |

|  |  |  |
| --- | --- | --- |
| c. |  | $ |
|  | **Automobile Make & Model** | Estimated “Blue Book” Value (*See* “[www.kbb.com](http://www.kbb.com/)”) |

VIN Number (Required)

$ Community Property Yes No

Lien holder’s Name Amount of Lien *See definition below.*

|  |  |  |
| --- | --- | --- |
| 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

Bank Address *See definition below.*

City, State & Zip Code

e. $

**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

Bank Address *See definition below.*

City, State & Zip Code

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** | Face Value of Policy |  |
|  | Policy Number | Community Property Yes  *See definition on previous page.* | No |

Insurance Company Address

City, State & Zip Code

# 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

*See definition on previous page.*

# 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

*See definition on previous page.*

# Section VI. Information Regarding Decedent’s Debts

* 1. 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 |

*Please list information regarding all other debts on back*

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

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.