

Probate Worksheet



The following form is designed to help us to better litigate your probate matter.

Please complete this questionnaire and return it as soon as possible. It is important that you answer this worksheet **HONESTLY, ACCURATELY, and COMPLETELY.**

You should answer all questions relevant to your case. If a question does not apply to your particular situation, please mark the question "N/A." If the answer to any question requires more space than has been provided on the form, please complete your answer on a separate sheet. Refer to the question number to which your answer applies and attach your answer to this questionnaire. Be advised, your completion and submission of this form does not establish an attorney-client relationship.

Your responses to these questions will help organize your case and will help reduce attorney fees by limiting the time required to assemble information after the case is in progress. Note, however, completing this form or simply submitting it to Hunt Law Firm does not create an attorney-client relationship.

NOTICE OF CONFIDENTIALITY

THE INFORMATION IN THIS DOCUMENT IS SUBJECT TO THE ATTORNEY-CLIENT PRIVILEGE, AS PROVIDED IN THE TEXAS RULES OF EVIDENCE. HOWEVER, IF A PROFESSIONAL, INCLUDING AN ATTORNEY OR AN EMPLOYEE OF AN ATTORNEY, HAS CAUSE TO BELIEVE THAT A CHILD HAS BEEN ABUSED OR NEGLECTED OR MAY BE ABUSED OR NEGLECTED OR THAT A CHILD IS A VICTIM OF AN OFFENSE UNDER SECTION 21.11 OF THE TEXAS PENAL CODE, AND THE PROFESSIONAL HAS CAUSE TO BELIEVE THAT THE CHILD HAS BEEN ABUSED AS DEFINED BY SECTION 261.001 OR 261.401 OF THE TEXAS FAMILY CODE, THE PROFESSIONAL SHALL MAKE A REPORT NOT LATER THAN THE FORTY-EIGHTH HOUR AFTER THE HOUR THE PROFESSIONAL FIRST SUSPECTS THAT THE CHILD HAS BEEN OR MAY BE ABUSED OR NEGLECTED OR IS A VICTIM OF AN OFFENSE UNDER SECTION 21.11 OF THE TEXAS PENAL CODE. THE REPORT SHALL BE MADE TO THE APPROPRIATE AGENCY.

THE CONTENTS OF THIS DOCUMENT MAY CONSTITUTE ATTORNEY WORK PRODUCT, ARE CONFIDENTIAL, AND ARE NOT TO BE DISCLOSED TO THIRD PERSONS OTHER THAN THOSE TO WHOM DISCLOSURE IS MADE IN FURTHERANCE OF THE RENDITION OF PROFESSIONAL LEGAL SERVICES.

Privacy Policy Regarding Social Security Numbers: Social Security numbers will be divulged only when necessary, during the course and within the scope of our employment. Texas requires all Applications to Probate have the last three digits of the Applicant's and Decedent's Social Security Numbers. Full Social Security numbers are also required to obtain a Tax ID Number for the estate from the IRS, called an EIN. Only employees of the firm who have a need to know will have access to this personal information. Every step is taken to protect the client's privacy. This information is kept secure within the office of the firm in file folders and file drawers. Client information will eventually be shredded.

EMAIL YOUR COMPLETED WORKSHEET TO INFO@HUNTLAWTEXAS.COM.

I. Prospective Client Information

First Name		Middle Name		Last Name	
Maiden Name (if applicable)			How did you learn about Hunt Law Firm, PLLC?		
Date of Birth		City, County, & State of Birth		Gender	
Social Security Number			Texas Driver License or State ID Number		
Street Address					
City		State		ZIP	
Email			Phone Number		
Relationship to Decedent			Are you named as an Executor in the Decedent's Will?		
☐ Surviving Spouse ☐ Child of the Decedent ☐ Sibling of the Decedent ☐ Parent of the Decedent ☐ Friend ☐ Other / Not Listed			☐ YES ☐ NO		
			Do you currently have a Will?		
			☐ YES ☐ NO		
If you checked Other /Not Listed above, please describe:			Are you interested in an Estate Planning consultation?		
			☐ YES ☐ NO		
Have you ever been convicted of a felony or any crime involving theft or trust (such as fraud)? <i>Texas law prevents anyone convicted of such a crime from qualifying as the Executor of an estate.</i>					
☐ YES ☐ NO					
How does your name appear on the Will? <i>You may have to look where you are named as Executor. Be sure to include your name exactly as it appears.</i>					
If your name appears differently on the Will than on your driver's license, passport, or other government-issued identification, please provide your name as it appears on your identification. <i>Your name does not have to match all of these, but if you use a different name on your identification than on the Will, we need to include it.</i>					

II. Decedent's Information

A Decedent is the individual who has died.

If you have a copy of the Decedent's death certificate, you may email a copy to info@buntlawtexas.com.

A death certificate is not required to probate the Will. It just makes collecting information easier.

Decedent's First Name		Decedent's Middle Name		Decedent's Last Name	
Decedent's Date of Birth		Decedent's Date of Death		Decedent's Age at Death	
Decedent's Social Security Number			Decedent's Texas Driver License or State ID Number		
Street Address (at the time of passing)					
City		State		ZIP	
City Decedent Died In		State Decedent Died In		County Decedent Died In	
Did the Decedent own a house or other real property in Texas at the time they died?			Did the Decedent own a car, truck, or other vehicle with a title at the time they died?		
☐ YES ☐ NO			☐ YES ☐ NO		
Did the Decedent have any children after the Will was created?		Marital status at the time of the Decedent's death		Did the Decedent divorce after the Will was created?	
☐ YES ☐ NO		☐ Married ☐ Unmarried		☐ YES ☐ NO	

III. Will Information

If you have a copy of the Will, you may email it to info@buntlawtexas.com.

Do you have the Original Will? To answer Yes you must have the original of each page of the Will. Anything other than originals of each page should be answered as "No".	
☐ YES ☐ NO	
Date the Will was Executed	County the Will was Executed in
Name of the First Witness listed on the Will. Use the witness on the left if they are listed side by side.	
Name of the Second Witness listed on the Will.	

Executors

Most Wills have more than one person listed as Executor. The first person listed has priority to serve, while the others are called "Successor Executors." Please list the first three executors in the order in which they appear in the Will.

Name of the First Executor as it appears in the Will
Name of the Second Executor or Successor Executor as it appears in the Will
Name of the Third Executor or Successor Executor as it appears in the Will

Holographic Will

If the Will is handwritten, list the name of two individuals who are not beneficiaries or immediately related to the beneficiaries who can identify the Decedent's handwriting and signature.

Name of First Individual	Name of Second Individual
Relationship to Decedent	Relationship to Decedent
Phone Number	Phone Number
Email Address	Email Address

Codicil

Sometimes there is an amendment to the Will. This formal amendment is called a Codicil. If there is a Codicil, it is part of the Will and must also be submitted. If you have a copy of the Codicil, you may email it to info@huntlawtexas.com.

Is there a Codicil (amendment) to this Will?	Date the Codicil was Executed
☐ YES ☐ NO	
Name of the First Witness to the Codicil	Name of the Second Witness to the Codicil

IV. The Decedent's Estate

The Texas Estates Code requires that we provide a general description of the property owned by the Decedent at the time of death. This is a very general description. Later in the process, we will address specifics with an inventory of the Estate. Use your best guess in answering these questions as you may not have specific information available to you now.

To the best of your knowledge, the Decedent's estate is valued at:
☐ More than \$10,000.00 ☐ Less than \$10,000.00

Which of the following assets does the Decedent own?		
☐ Checking Account ☐ Savings Account ☐ Retirement Account ☐ Brokerage / Investment Account ☐ Certificate of Deposit ☐ Life Insurance	☐ Family Home ☐ Other Real Property / Land ☐ Vehicle ☐ Business ☐ Tangible Personal Property ☐ Trust	☐ Credit Card ☐ Student Loan ☐ Personal Loan ☐ Vehicle Loan ☐ Mineral, Oil & Gas Interest ☐ Other Asset/Debt
If you checked Other Asset/Debt above, please describe:		
To the best of your knowledge, does the Decedent have property subject to a Home Equity Line of Credit (HELOC)? <i>This is different from a mortgage or home refinance as it requires specific attention to avoid foreclosure.</i>		
☐ Decedent did not own an interest in property ☐ Decedent owned an interest in property but no HELOC is involved ☐ Decedent owned an interest in property but it is unknown if a HELOC is involved ☐ Decedent owned an interest in property subject to a HELOC		