

SPRING 2011
UNIT II (TESTATE SUCCESSION)
HANDOUT #2: TESTATE SUCCESSION COMPARISON CHART

Please complete chart; OK statute attached.

I. HOLOGRAPHIC (UNATTESTED) WILLS

Oklahoma Ti. 84, § 54	UPC 2-502(b)
1. _____ handwritten, dated & signed by T	1. Signature and _____ in T's handwriting.
Which is easier to meet? Later, consider curative doctrines on each.	

II. ATTESTED WILLS

Oklahoma Ti. 84, § 55	UPC 2-502(a)
1. Written	1. Written
2. _____ (signed at end) by T or other in T's presence & at T's direction (proxy)	2. _____ by T or in T's name in T's _____ & at T's direction (proxy)
3. Subscription or acknowledgment of subscription made in the presence of the witnesses	3. [T need not be in other's presence when signed]
4. Declaration aka publication ("this is my will," communicated either expressly or by conduct) at subscription or acknowledgment.	4. [No requirement of publication]
5. 2 witnesses, who each must sign at end of will at T's _____ and in T's _____	5. Either: a. 2 witnesses, who each must sign within a _____ after witnessing either T's or proxy's signature; T's acknowledgment of signature; OR T's acknowledgment of will. OR b. _____ by T before a notary or other so-authorized person
Which easier to meet? Later, consider curative doctrines on each.	

Title 84. Wills and Succession (Refs & Annos)

§ 54 Holographic wills--Requisites

A holographic will is one that is entirely written, dated and signed by the hand of the testator himself. It is subject to no other form, and may be made in or out of this state, and need not be witnessed.

§ 55 Formal requisites in execution--Self-proved wills

Every will, other than a nuncupative will, must be in writing; and every will, other than a holographic will and a nuncupative will, must be executed and attested as follows:

1. It must be subscribed at the end thereof by the testator himself, or some person, in his presence and by his direction, must subscribe his name thereto.
2. The subscription must be made in the presence of the attesting witnesses, or be acknowledged by the testator to them, to have been made by him or by his authority.
3. The testator must, at the time of subscribing or acknowledging the same, declare to the attesting witnesses that the instrument is his will.
4. There must be two attesting witnesses, each of whom must sign his name as a witness at the end of the will at the testator's request and in his presence.

5. Every will, other than a holographic and a nuncupative will, and every codicil to such will or to a holographic will may, at the time of execution or at any subsequent date during the lifetimes of the testator and the witnesses, be made self-proved, and the testimony of the witnesses in the probate thereof may be made unnecessary by:

- a. the acknowledgment thereof by the testator and the affidavits of the attesting witnesses, each made before an officer authorized to take acknowledgments to deeds of conveyance and to administer oaths under the laws of this state, such acknowledgments and affidavits being evidenced by the certificate, with official seal affixed, of such officer attached or annexed to such testamentary instrument in form and contents substantially as follows:

THE STATE OF OKLAHOMA
COUNTY OF _____

Before me, the undersigned authority, on this day personally appeared _____, _____, and _____, 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 first duly sworn, said _____, testator, declared to me and to the said witnesses in my presence that said instrument is

his last will and testament or a codicil to his last will and testament, and that he had willingly made and executed it as his free and voluntary act and deed for the purposes therein expressed; and the said witnesses, each on his oath stated to me, in the presence and hearing of the said testator, that the said testator had declared to them that said instrument is his last will and testament or codicil to his last will and testament, and that he executed same as such and wanted each of them to sign it as a witness; and upon their oaths each witness stated further that they did sign the same as witnesses in the presence of the said testator and at his request and that said testator was at that time eighteen (18) years of age or over and was of sound mind.

Testator

Witness (signature)

Name and Residence (printed)

Witness (signature)

Name and Residence (printed)

Subscribed and acknowledged before me by the said _____, testator, and subscribed and sworn before me by the said _____, and _____ witnesses, this _____ day of _____, A.D., _____.

(SEAL) (SIGNED) _____

(OFFICIAL CAPACITY
OF OFFICER); or

b. the written declaration of the testator and the written declarations of the attesting witnesses made in substantially the following form:

We the undersigned are the testator and the witnesses, respectively, whose names are subscribed to the annexed or foregoing instrument in their respective capacities, and we do hereby declare that said _____, testator, declared to said witnesses that said instrument is his last will and testament or a codicil to his last will and testament, and that he willingly made and executed it as his free and voluntary act and deed for the purposes therein expressed; and said witnesses further declare that the said testator declared to them that said instrument is his last will and testament or codicil to his last will and testament, and that he executed same as such and wanted each of us to sign it as a witness; and that we did sign the same as witnesses in the presence of the said testator and at his request and that said testator was at that time eighteen (18) years of age or over and was of sound mind, all of which we declare and sign under penalty of perjury this _____ day of _____.

Testator

Witness (signature)

Name and Residence (printed)

Witness (signature)

Name and Residence (printed)

6. Any person falsely executing a written declaration as a witness or misrepresenting his or her identity with the intent to defraud another person pursuant to subparagraph b of paragraph 5 of this subsection shall, upon conviction, be deemed guilty of the felony of perjury and shall be subject to the penalties prescribed by law.

7. A self-proved testamentary instrument shall be admitted to probate without the testimony of any subscribing witness, unless contested, but otherwise it shall be treated no differently than a will or codicil not self-proved. Furthermore, a self-proved testamentary instrument may be revoked or amended by a codicil in exactly the same fashion as a will or codicil not self-proved and such a testamentary instrument may be contested as a will not self-proved.