Information & Instructions: Proceeding & affidavit to determine heirship

- 1. Frequently an Estate may have fittle or no assets, and in order to avoid probate, the practitioner may consider the use of an affidavit of heirship.
- 2. An Estate must be administered if there are two or more unpaid creditors.
- 3. If an administration is not required, the affidavit of heirship may be used when the decedent dies intestate and there are no unpaid bills.
- 4. This procedure may avoid an administration.
- 5. The affidavit is filed in the county clerk's office where the decedent lived and in each county when he arished what real proper.
- 6. The affidavit provides notice to all persons that the decedent is dead, when and where the decedent died, who his or her heirs are, and recites the fact that the decedent died intestate.
- 7. If a question exists regarding the identity of the decedent's heirs, then an action to determine heirship should be filed.
- 8. If a decedent dies testate and there are no debts and an administration is unnecessary, a better practice would be to file the will as a muniment of title. This procedure provides better protection to the heirs than an affidavit of heirship.
- 9. Section 52. of the T x. Profat od ets forth a suft or Affir evit of Heirship form.
- 10. Section 52 of the Texas Probate Code states the following:

Sec. 52. RECORDED INSTRUMENTS AS PRIMA FACIE EVIDENCE.

(a) A statement of facts concerning the family history, genealogy, marital status, or the identity of the heirs of a decedent shall be received in a proceeding to declare heirship, or in a suit involving title to real or personal property, as prima facie evidence of the facts therein stated, if the statement is contained in either an affidavit or any other instrument legally executed and acknowledged or sworn to before, and certified by, an officer authorized to take acknowledgments or oaths as applicable, or any judgment of a court of record, and if the affidavit or instrument has been of record of for five years of more in the deed records of any county in this state in which such real or personal property is located at the time the suit is instituted, or in the deed records of any county of this state in which the decedent had his domicile or fixed place of residence at the time of his death.

If there is any error in the statement of facts in such recorded affidavit or instrument, the true facts may be proved by anyone interested in the proceeding in which said affidavit or instrument is offeed in the proceeding in which said affidavit or instrument is offeed in the proceeding in which said affidavit or instrument is offeed in the proceeding in which said affidavit or instrument is offeed in the proceeding in which said affidavit or instrument is offeed in the proceeding in which said affidavit or instrument is offeed in the proceeding in which said affidavit or instrument is offeed in the proceeding in which said affidavit or instrument is offeed in the proceeding in which said affidavit or instrument is offeed in the proceeding in which said affidavit or instrument is offeed in the proceeding in which said affidavit or instrument is offeed in the proceeding in the proceeding in which said affidavit or instrument is offeed in the proceeding in the proceedin

- (b) An affidavit of facts concerning the identity of heirs of a decedent as to an interest in real property that is filed in a procee ling as suredescribed by Subsection (a) of this section may be in the form described by Section 52A of this code.
- (c) An affidavit of facts concerning the identity of heirs of a decedent does not affect the rights of an omitted heir or a creditor of the decedent as otherwise provided by law.

This statute shall be cumulative of all other statutes on the same subject, and shall not be construed as abrogating any right to present evidence or to rely on an affidavit of facts conferred by any other statute or rule of law.

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THIS DOCUMENT

THANK YOU

Information & Instructions: Proceeding to determine heirship

- 1. Proceeding to determine heirship is a simple procedure.
- 2. It should be filed within four years from the date of the decedent's death.
- 3. A determination of heirship may be combined with a determination that there is no need for administration.
- 4. The combination is typically used when a person owns real or personal property of the Estate and the person dies without a will and there has been no administration and you wish to avoid a dependent administration.
- 5. Ps ypic Hy us d server the would be wis pass be interted. P preverty that passed by intestacy under a will.
- 6. The application is filed in the county where the real property is located or where the personal property is located.
- 7. All heirs or beneficiaries must be made a party to the application and properly served by citation or file a waiver of service of citation or file an answer.
- 8. The following are required in Heirship determinations: Citation by publication and the appointment of an attorney ad litem to represent un-named heirs. Children younger than 19 may not sign a waiver of citation.
- 9. The best practice is to personally serve all heirs of beneficiaries and publish citation by publication and have the appointment of an attorney ad litem to avoid claims from unknown heirs.
- 10. The above is distinguished from an affidavit of heirship since an affidavit of heirship does not protect one from claims asserted by unknown heirs.

THANK YOU

Form: Application to determine heirship VIEW

IN TH	IE ESTATE OF	IN THE [PRO	OBATEJ COURT
[NAM	[E],	NO;	
DECEASED		[NAME], CO	UNTY, TEXAS
	PLEATION TO DETER Name of applicant, Applicant, requests the co		COPY
unto tl	ne court the following.		
1.	[Name of decedent], Decedent died on [Date],	in	County, Texas.
2.	Applicant resides at [address].		
3.	Applicant would show that Decedent died [wit	h or without a v	vill].
4. appear	Applicant would show that no administration is necessary, and it is therefore in the best interest.		
the na	mes and identities of Decedent's heirs.		
[If an	administration is pending on Decedent's Estate a	and it is necessa	ary to determine the heirs,
insert	the following: An administration is currently pe	nding on Deced	lent's Estate in the above
entitle	d and numbered cause; however, it is necessary	and is in the be	st interests of the Estate for
the court to determine Decedent's heirs.]			
5.	Applicant is an owner of all of part of Deceder	nt's Estate.	J
6.	The names and residences of all of Decedent's	heirs and the re	elationship of each heir to
Deced	ent and the true interest of the applicant and of	each of the heir	s of Decedent's Estate are as
follow	Elican Bir benerancsaldrum	nsh p televed	etsin te even tenmes

and residences of all of the heirs are unknown to Applicant disclose the same and provide any information, if any, that might be helpful in identifying and/of locating the same].

- 7. Applicant would show that at the time of Decedent's death, Decedent owned the following property: [provide a complete description of each item or property, state whether the same is separate or community property].
- 8. Decedent's family background and genealogy is as follows: [state Decedent's birth date and birthplace; names, birth dates and birthplaces of Decedent's parents: Decedent's parent's date of death, if applicable, name, birth date and birthplace of Decedent's spouse; date of divorce, if applicable; name, age, birth date and address of each of Decedent's children; names, age, birth date and address of each of Decedent's siblings, if any].
- 9. Based on the above, Applicant would show to the court that all children born to or adopted by Decedent have been listed and each marriage of the Decedent has been stated.
- 10. Applicant would show that the information stated in this Application is submitted in compliance with Texas Probate Code Section 49 and there are no debts owed by the Decedent that are not secured by liens upon real Estate. Accordingly, there is no necessity for an administration of Decedent's Estate.

PRAYER

Applicant prays that citation be issued as required by law and that an attorney ad litem be appointed to represent Decedent's living heirs whose names and whereabouts are unknown and that upon a hearing, this court determine the identity of Decedent's heirs and the respective shares and interest of Decedent's Estate and the court determine that no necessity exists for an administration of Decedent's Estate.

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	By
	[Attorney's Name]
State of Pexas EASE County of	Attorney for Applicant [Attorney's Address] [Telephone Number] [Facsimile Number] [Bar Card Number] The control of the contr
BEFORE ME, the undersigned authoral after being duly sworn, stated the	ority, on this day personally appeared [Name of applicant] nat:
	legations of the foregoing Application are true in substance or circumstance has, within my knowledge, been omitted
Subscribed and sworn to before me of the subscribed and sworn to before me of the subscribed and sworn to be subscribed.	DOCUMENT
	Signature of officer
	Notary's typed or printed name
	My commission expires:

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THAN (or Ktary's Karp) U

Form: Heirship affidavit

OR

PREVIEW

IN TI	HE ESTATE OF	IN THE [PROBATE] COURT
[NAN	ME],	NO;
DEC	EASED	[NAME], COUNTY, TEXAS
	PLEASE DULL BY	FFIDAVIT COPY two Disinterested Witnesses
	Before me, the undersigned authority, on this	day personally appeared [Name] and
Nam	ne], who being first by me duly sworn on oath sta	ite:
1.	I, [Name], reside at [Address, County, state].	
2. decea	I am person ally acquired with the family his ased, hereinafter called "Decedent" who was my	fory and first pfilmirship of [Name], [relationship].
3.	I knew Decedent for years.	
4.	Decedent was married to [Name] on	, and remained married until
his/h	ner] death and was never divorced.	
	OR THANK	YOU
	Decedent was never married.	

Decedent was not married at the time of death but was married to [Name], and was [widowed/egealFormsForTexas.Com

5.	Decedent died onin [Address_County_state] without leaving a Will. There
was no	o administration nor was any necessary, there being no debts at this time.
6.	Decedent had no children.
	OR
Deced	ent had the following children by birth or adoption: [List all children, living or deceased, if
deceas	sed indicate].
	PLEASE DO NOT COPY
	Address:
	Age:
	Alive or Deceased:
7.	Decedent never adopted any children nor cared for any children in the home other than
the abo	ove named children.
8.	If any child of Deceard is deceased list all children of the deceased child or children.
	Deceased child:
	Children of deceased child
	Name:
	Address:
	Age: THANK VOI
	Alive or Deceased: THANK YOU
	Deceased child:
	Children of deceased child
	Name: galFormsForTexas.Com

	Age:
	Alive or deceased: PREVIEW
9.	[If decedent was not survived by children or grandchildren, then complete.] Decedent
was su	rvived by his/her parent or parents:
	Name:
	PLEASE DO NOT COPY
10.	[If decedent was not survived by his/her parents or only one parent, then complete.]
Deced	ent was survived by the following brother[s] and/or sister[s].
	Name:
	Address: THIS DOCUMENT
	AND/OR
11.	AND/OR If any brother[s] or sister[s] have predeceased Decedent complete.
11.	if any brother[s] of sister[s] have predeceased Decedent complete.
	Name of deceased brother/sister:
	Children of deceased brother/sister XVOU
	Name:
	Address:
	Age:
12.	Alive or Perceive Torms For Texas. Com The above statements are true and correct.

PI	REVIEW
	Disinterested Witness
	Disinterested Witness
State of Texas County of Subscribed and sworn to before me o	DO NOT, COPY

Signature of officer

Notary's typed or printed name

THIS DOCUMENT [or Notary's Stamp]

THANK YOU

Form: Statement of disinteressed vitheses for a for bined mall estate and heirship affidavit

STATEMENT OF DISINTERESTED WITNESSES

BEFORE ME, the undersigned appeared, [names of two witness] who stated upon their oaths the following:

- 1. I have no financial interest in [name of decedent]'s Estate.
- 2. I am not related to the decedent under the Texas Probate Code laws of descent and distributed the Rate ATC as TOO NOT COPY
- 3. I have not been promised, nor shall I receive any moneys or assets of the decedent's Estate as a result of making this Affidavit.
- 4. I have reviewed and read the foregoing Affidavit and the facts contained in the Affidavit are true and correct.
- 5. That the value of the decedent's Estate at the date of his or her death, exclusive of homestead and exempt property. See to exempt those liabilities which are secured by the homestead and exempt property.
- 6. That the names, addresses, and telephone numbers of all distributees, heirs, devisees or assignees of Decedent's property or money and their right to receive the property or money is as follows:

Names, Addresses, a d'Fre le Mambers o Ristributées

Capacity in which claim is made: Ex. Son

Portion of Estate to which entitled: Ex. 1/2

7. Legan our ms For Texas. Com

PREVIEW,

	[Name]
State of Texas County of	
Subscribed and sworn to before me on	by
PLEASE	OO NOT COPY
	Signature of officer
	Notary's typed or printed name
	My commission expires:
THIS D	COCUMENT ONESS UNIENT
Signed or	n,
State of Texas County of	[Name]
Subscribed and sworn to be ore moor	NK YOU

LegalForms Figure of officer Forms Forms Exast Com



[or Notary's Stamp]

	. , , , , ,
I,	[name of notary], the notary public whose signature appears above
certify that I am	not an attorney in this case.
	[Name of notary]

PLEASE DO NOT COPY

THIS DOCUMENT

THANK YOU

Information & Instructions: Heirship waiver of citation 1. Send the enclosed waiver to the other persons and parties who are required to be served

- the case.
- 2. Children younger than 19 may not sign a waiver of citation.

PLEASE DO NOT COPY

THIS DOCUMENT

THANK YOU

Form: Heirship waiver of citation PREVIEW

State of Texas County of
BEFORE ME, the undersigned authority, on this day personally appeared [name of Affiant], who
being duly sworn on oath stated as follows:
1. My name is .
2. Name] D deden was met relators tip for example: proper] and I (m) near or distributee of [Name], Decedent, in an action now pending before the Probate Court Number of County, Texas.
3. I state under oath that I have been provided with a copy of the Application filed by [Applicant's Name] for Determination of Heirship of [Name], Decedent.
4. I affirm that all allegations contained in the Application are true and correct and that this matter can be taken up and considered by the Court at any time provided by law.
5. I hereby waive any and all bond, bond requirements, surety and issuance of financial protection. 6. I also waive any and all service of any citation or notice which may be required at law or otherwise. I also affirm that this matter can be taken up and considered by the Court at any time provided by law.
Signed on
[Name]
State of Texas County of A RITZ XZOTI
Subscribed and sworn to before me on

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	[or Notary's Stamp]
I,above, certify that I a	[name of notary], the notary public whose signature appears am not an attorney in this case.
	[Name of notary]

PLEASE DO NOT COPY

THIS DOCUMENT

THANK YOU

PREVIEW

PLEASE DO NOT COPY

THIS DOCUMENT

THANK YOU

PREVIEW

PLEASE DO NOT COPY

THIS DOCUMENT

THANK YOU

Form: Statement of disinterescent tithe ses for a for bined mall estate and heirship affidavit

STATEMENT OF DISINTERESTED WITNESSES

BEFORE ME, the undersigned appeared, [names of two witness] who stated upon their oaths the following:

- 1. I have no financial interest in [name of decedent]'s Estate.
- 2. I am not related to the decedent under the Texas Probate Code laws of descent and distributed the Rate ATC ST. DONOT COPY
- 3. I have not been promised, nor shall I receive any moneys or assets of the decedent's Estate as a result of making this Affidavit.
- 4. I have reviewed and read the foregoing Affidavit and the facts contained in the Affidavit are true and correct.
- 5. That the value of the decedent's Estate at the date of his or her death, exclusive of homestead and exempt property. See to execute the date of his or her death, exclusive of homestead and exempt assets exceed the liabilities except those liabilities which are secured by the homestead and exempt property.
- 6. That the names, addresses, and telephone numbers of all distributees, heirs, devisees or assignees of Decedent's property or money and their right to receive the property or money is as follows:

Names, Addresses, and The le Mambers of Ristributees

Capacity in which claim is made: Ex. Son

Portion of Estate to which entitled: Ex. 1/2

7. Legal or ms For Texas. Com

PREVIEW,

	[Name]
State of Texas County of	
Subscribed and sworn to before me on	by
PLEASE	OO NOT COPY
	Signature of officer
	Notary's typed or printed name
	My commission expires:
THIS D	COCUMENT ONESS UNIENT
Signed or	n,
State of Texas County of	[Name]
Subscribed and sworn to be ore moor	NK YOU

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[or Notary's Stamp]

	. , , , , ,
I,	[name of notary], the notary public whose signature appears above
certify that I am	not an attorney in this case.
	[Name of notary]

PLEASE DO NOT COPY

THIS DOCUMENT

THANK YOU

PREVIEW

PLEASE DO NOT COPY

THIS DOCUMENT

THANK YOU

Form: Motion to appoint attorney ad litem in a small estate or heirship proceeding

IN THE ESTATE OF	IN THE [PROBATE] COURT
[NAME],	NO;
DECEASED	INAMEL COUNTY TEXAS

Name of Movant, moves the court to appoint an attorney ad litem to represent

Decedent's heirs whose names and/or whereabouts are unknown. Movant further requests the court to appoint that attorney for heirs who may be suffering from legal disability.

Respectfully Submitted,



[Attorney's Name]

Attorney for Applicant [Attorney's Address] [Telephone Number] [Facsimile Number] [Bar Card Number]

THANK YOU

Form: Order appointing attorney ad litem in a small estate or heirship proceeding $\mathbf{P}\mathbf{R}\mathbf{E}\mathbf{V}\mathbf{T}\mathbf{E}\mathbf{V}$

IN THE ESTATE OF	IN THE [PROBATE] COURT
[NAME],	NO;
DECEASED	INAMEL COUNTY TEXAS

PLEASE DO TORNEY ADLITED PY and TORNEY ADLITED PY and The motion of [name of Movant], to appoint an attorney ad

litem was presented to the court, and the court finds that it has jurisdiction of the matter. The court further finds that the heirs of [name of decedent], Decedent, whose names and whereabouts are unknown and/or suffering legal disability, have not answered or entered an appearance in the above entitled and numbered cause and therefore, an attorney ad litem should be appointed.

It is hereby ORDERED ADJUDGED and DECREED that [name], an attorney licensed to practice law before this court is appointed in the interest of the above stated defendants and that the suit proceed and be submitted by this attorney as in other cases where service is made by publication.

Signed	on	

THANK YOU

Information & Instructions: Answer of attorney ad litem in a small estate or heirship proceeding

- 1. The attorney should file an answer on behalf of the living heirs or heirs suffering under legal disability.
- 2. The answer enters an appearance on the unknown heirs and heirs under disabilities so that the court has jurisdiction of all persons in order to determine the heirship.

PLEASE DO NOT COPY

THIS DOCUMENT

THANK YOU

Form: Answer of attorney ad litem in a small estate or heirship proceeding

IN THE ESTATE OF	IN THE [PROBATE] COURT
[NAME],	NO;
DECEASED	[NAME], COUNTY, TEXAS

PLEASE TORNEY AD LITEM OF LINE [Name], the duty appointed attorney ad litem for the living heirs of [name of decedent],

Decedent, whose names and whereabouts are unknown and for the heirs who may be suffering legal disability and would show unto the court the following:

- 1. Subject to any stipulations and admissions as may hereafter be made, these Defendants assert a general denial as is authorized by Rule 92 of the Texas Rules of Civil Procedure, and Defendants respectfully request that the Applicant be required to prove the charges and allegations against these Defendants by a preponderance of the evidence as is required by the Constitution and laws of the State of Texas.
- 2. The above answer is respectfully submitted to the Court and Jury by the following Defendants, [names], who ask that the Applicant take nothing; that these Defendants be allowed to recover the costs which have been incurred by reason of the charges and allegations of the Applicant against these Defendants; and that the Court give these Defendants any other and further relief from these charges as the Court may feel that these Defendants are entitled to.

Respectfully Submitted,

Legal	orms	Fin Mame	Texa	is.C	om
0	By_				



Attorney for Applicant [Attorney's Address] [Telephone Number] [Facsimile Number] [Bar Card Number]

PLEASE DO NOT COPY

THIS DOCUMENT

THANK YOU

Form: Statement of facts in a small estate or heirship proceeding PRE VIEW

IN THE ESTATE OF	IN THE [PROBATE] COURT
[NAME],	NO;
DECEASED	[NAME], COUNTY, TEXAS
PIFASE STATE Names], Afriants, on this day personal stated on their oaths that:	TEMENT OF FACTS To provide the court and after being duly sworn
1 We are well acquainted with the	family of the Decedent.
2.	ied on [Date], and was survived by [name of surviving ne[s] of surviving minor children], minor child[ren].
3. We have made a diligent search knowledge the Decedent died intestate.	of Decedent's homestead and to the best of our
4. Decedent was let on tell, at birth dates, birthplaces and dates of deal	l cat b]. Deceden so par ets were [provide names, in, it applicable].
5. Decedent was married to [name]	J.
	e of Decedent and have not been promised any of ted to Decedent under the laws of descent and
Signed on	
THA	Niks YOU
	Affiants
State of Texas	
County of	sForTexas.Com

PREVIEW

[Name of court clerk]

Court of _____ County, Texas

By:

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THIS DOCUMENT

THANK YOU

Form: Judgment declaring heirship PREVIEW

IN THE ESTATE OF	IN THE [PROBATE] COURT
[NAME],	NO;
DECEASED	INAMEI, COUNTY, TEXAS

PIECE ASE TO SELARING HEIRSHIP COPY On this day came to be heard the sworn Application to Heirship of the Estate of Thame of

decedent], Decedent, wherein [Name of applicant] requests the court to declare the heirs of Decedent and it appears to the Court that it has jurisdiction in the matter and the court finds that all heirs and parties interested in the Estate of Decedent have been duly and legally served with citation as required by law, filed a waiver of citation or entered an answer in this suit; thereafter, the court appointed an attorney ad litem to appear and answer to represent defendants and that attorney ad litem filed an answer on behalf of defendants; this court has jurisdiction of the subject matter and all parties; that the evidence presented and admitted fully and satisfactorily proves each and every issue presented unto the Court and that Decedent died intestate and that the heirship of the Decedent has been fully and satisfactorily proved as well as the identity and nature of Decedent's property as being separate or community and that the interest and shares of each of the heirs in that property and that no administration is necessary.

Accordingly, the court finds and it is hereby ORDERED, ADJUDGED, and DECREED that the names and places of residence of the heirs of Decedent and their respective shares and interests in the real and personal property of Decedent are as follows:

Liebae presentation at least a sent Com

It is further hereby ORDERED ADILIDGED and DECREED that the attorney ad litem appointed to represent the interests of the Defendants is allowed a fee of \$ ______ to be paid out of the assets of the Decedent.

The court additionally finds that there exists no necessity for administration of the Estate of Decedent, none is ordered, and upon payment of all costs of Court no further proceedings be had in this cause.



THIS DOCUMENT

THANK YOU