

## **PROBATE FILING CHECKLIST**

In Re: Estate of [Principal: Name of Decedent or (Proposed) Ward], Deceased, Cause No. [Cause Number]

Set up client in Timeslips, record retainer. Set up client folder (“Applicant - E of Decedent”), fill out and save [Data File - Probate or Guardianship Case.dat](#)

- [Application for Determination of Heirship and for Administration](#)
- [Cover Letter](#)
- [Cover Letter for Filing Ad Litem Fee](#)

**After filing: file original Will per TRCP Rule 21(f)(12). Re-merge this checklist form to add cause number and date of filing.**

All heirs need to be personally served with citation or file waivers of citation, then a Certificate of Compliance must be filed prior to hearing:

- [Waiver of Citation & Request for Independent Administration](#)
- [Certificate of Compliance §202.057](#)

Filing: **[Date of Filing, text format (e.g., January 1, 2020)]**      Hearing Date first Monday after: **January 12, 1900**

**CALL CLERK FOR HEARING DATE. ADD HEARING DATE TO DATA FILE AND THIS FILE.**

## PROBATE HEARING CHECKLIST

In Re: Estate of [Principal: Name of Decedent or (Proposed) Ward], Deceased, Cause No. [Cause Number]  
Date of Hearing: [Hearing Date, e.g. 01/01/2020]

*Create documents for hearing:*

- Make sure citation returned (both published and posted)
- [Direct Examinations of Witnesses](#)
- [Proofs of Heirship and Other Facts \(2\)](#)
- [Judgment of Heirship](#)
- [Direct Examination of Applicant - Heirship](#)
- [Proof of Death and Other Facts](#)
- [Order Determining Administration](#)
- [Oath of Personal Representative](#)
- [SS-4 Form File](#), to create data file to import into [SS-4 for Estate](#)
- [Form 56 Form File](#), to create data file to import into [Form 56 Notice to IRS of Fiduciary Relationship](#)
- [Envelope for Order & Letters of Administration](#)
- [Guide for the Personal Representative](#)
- [Checklist for the Executor or Administrator](#)
- Blank check (to pay for Letters and Order, **plus certified copies of Order – one per piece of real estate outside of county**) with State Bar number under address, and case number in memorandum field

***Place all these in the respective hearing folders. When going to the hearing, add the case folder to the hearing folder, place both in briefcase along with computer (just in case adjustments or filings are needed), and a pen for client/witness signings.***

## PROBATE POST-HEARING CHECKLIST

In Re: Estate of [Principal: Name of Decedent or (Proposed) Ward], Deceased, Cause No. [Cause Number]  
Date Admitted: [Hearing Date, e.g. 01/01/2020]

<b>CURRENT STATUS:</b>	Do the following...
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***Set up reminder in task list for these deadlines, remind client.***

[Notice to Creditors](#) (publish by Wednesday, January 31, 1900)

Section 308.053 Notices to Secured Creditors (provide by Sunday, April 1, 1900):

[Section 308.053 Notice to Secured Creditors - Attorney](#)

[Section 308.053 Notice to Secured Creditors](#)

[Section 308.053 Affidavit of Compliance](#)

Inventory & Appraisalment (file by Sunday, April 1, 1900)

[Inventory Questionnaire](#)

[Inventory, Appraisalment, & List of Claims](#)

[Affidavit in Lieu of Inventory](#)

***WITHIN NINETY (90) DAYS OF HEARING DATE, e-file above documents as additional lead documents to a [cover letter](#) (Order on Inventory is filed as an attachment to the Inventory, except in Collin County)***

<i>Action</i>	<i>Days</i>	<i>Date</i>
Hearing Date / Date Admitted:		[Hearing Date, e.g. 01/01/2020]
Publish Notice to Creditors:	30	Wednesday, January 31, 1900
Send §308.053 Notices to Secured Creditors:	60	Friday, March 2, 1900
File Inventory & Appraisalment & Affidavits:	90	Sunday, April 1, 1900

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