

PROBATE FILING CHECKLIST

In Re: Estate of **FIELD**(Principal), Deceased

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](#)**IF("FIELD(DocTitle)"="of Administration")**

- [Application for Determination of Heirship](#)
- [Application for Administration](#)**ELSE**
- [Application](#)**ENDIF**
- [Cover Letter](#)**IF("FIELD(DocTitle)"!="of Administration")**
- [Cover Letter for Filing Original Will](#)

Remove staples from Will, scan. Redact if necessary. Staple back together with one vertical staple away from the original holes, and initial next to the staple on the Will.**IFNOTBLANK(OriginalExecutor)**

- [Waiver of Letters Testamentary](#)**ENDIF ENDIF**

Dallas County: A Will needs to be filed as an **attachment** to the Application. You should have **two** separate lead documents: 1) Application (“Application” filing code) + Will as attachment, 2) Civil Case Info Sheet (“Application” filing code). Need basic filing, Issue Citation, and Serve By Posting for total filing fee (\$266).

Dallas County Probate Court 2: requires that the applicant post notice on any application for determination of heirship. This is in addition to the published citation that is published in a local newspaper. When an application for determination of heirship is combined with an application for an independent administration, the Clerk will usually post notice. The attorney should check, however, to ensure that the determination of heirship is referenced in this posted notice in addition to the administration request

Collin or Tarrant County: Each document must be filed as a **Separate Lead Document but all in the same envelope**. You should have **two** separate lead documents: 1) Application (“Application” filing code) and 2) Will (“Will//Codicil” filing code). [Tarrant County has a [“Supplement Probate Case Information Sheet](#) as well.]

Collin County: At prove-up Judge Copeland will ask for the original Will; see [Collin County Expedited Probate Docket for Wills](#) also.

After filing, send original Will per Rule 21 of TRCP. Re-merge this checklist form to add cause number and date of filing.

Filing: **FIELD(Date of Filing)** Hearing Date first Monday after: **January 11, 1900**

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

PROBATE HEARING CHECKLIST

In Re: Estate of **FIELD**(Principal), Deceased, Cause No. **MRGCMND**(**FIELD**(Cause Number))
Date of Hearing: **MRGCMND**(**FIELD**(Date Admitted))

Create documents for hearing:

- [Waiver of De Novo Hearing](#) (*If before an associate judge*)**IF**("FIELD(DocTitle)"="of Administration")
- Make sure citation returned (both published and posted)
- [Direct Examinations of Witnesses](#)
- [Proofs of Heirship and Other Facts \(2\)](#)
- [Judgment of Heirship](#)
- [Order Determining Administration](#)**ELSE**
- [Order Probating Will](#)**ENDIF**
- [Direct Examination of Applicant](#)
- [Proof of Death and Other Facts](#)
- [Oath of Personal Representative](#)
- [SS-4 for Estate](#)
- [Form 56 Notice to IRS of Fiduciary Relationship](#)
- [Envelope for Order & Letters Testamentary](#)

- Dallas County PC #2:**
- [Affidavit of No Debts and No Dissolution of Marriage](#) (*muniment*)
 - [Proof Addendum Qualifications](#) (*for personal reps*)
 - [Proof Addendum for Disinterested Witness](#) (*if needed*)

Dallas County PC #3: *Hearing documents need to be e-filed as attachments to a cover letter (containing a confirmation of the hearing date), two weeks prior to hearing, along with \$2.00 for Order fee, ready for printing and use in court. Also remember to get to hearing early, as they schedule by check in.*

Map to Dallas County Probate Courts:

<http://maps.google.com/maps/ms?ie=UTF&msa=0&msid=201458908385796022448.00045ffdef9c64e570da0>

Collin County: At prove-up Judge Copeland will ask for the original Will. Prove-up documents are filed after the hearing with the clerk (no e-file). Judge Copeland prefers that the witnesses pre-sign all the proofs and oaths before testifying. Speeds up the process for him. The inventory is e-filed unless it is complete at the hearing and the clerks will usually accept it then.

Tarrant County: Must send in the hearing documents prior to the hearing, all as separate lead documents. The Proof of Death and the Oath are signed in front of the clerk, not the judge. At the hearing, signings will be done electronically - although the judge will often sign copies of the Order.

- [Guide for the Independent Executor/Administrator](#)
- [Checklist for the Executor or Administrator](#)
- Blank check (to pay for Letters and Order, **plus certified copies of Will and Order – one per piece of real estate outside of county**) with State Bar number under address, and case number in memorandum field

PROBATE POST-HEARING CHECKLIST

In Re: Estate of **FIELD**(Principal), Deceased, Cause No. **MRGCMND**(**FIELD**(Cause Number))

Date Admitted: **MRGCMND**(**FIELD**(Date Admitted))

CURRENT STATUS: Do the following...

Set up reminder in task list for these deadlines, remind client.

[Notice to Creditors](#) (publish by ??)

Section 308.002 Notice (provide by ??):

- [Section 308.002 Notice to Beneficiaries](#)
- [Section 308.002 Receipt & Waiver of Notice](#)
- [Section 308.002 Waiver of Notice](#)
- [Section 308.002 Certificate of Compliance](#)

Section 308.053 Notices to Secured Creditors (provide by ??):

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

Inventory & Appraisement (file by ??)

- [Inventory Questionnaire](#)
- [Inventory, Appraisement, & List of Claims](#)
- [Affidavit in Lieu of Inventory](#)

<i>Action</i>	<i>Days</i>	<i>Date</i>
Hearing Date / Date Admitted:		FIELD (Date Admitted)
Publish Notice to Creditors:	30	Tuesday, January 30, 1900
Provide §308.002 Notices:	60	Thursday, March 1, 1900
Send §308.053 Notices to Secured Creditors:	60	Saturday, March 31, 1900
File Inventory & Appraisement & Affidavits:	90	Saturday, March 31, 1900

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