

# Forms Index for the Texas Probate System (4th ed.)

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## FORMS

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- Form 96** Waiver and Renunciation of Right to Letters Testamentary (IA, ADE)
- Form 97** Affidavit Regarding Fulfillment of Will Admitted to Probate as a Muniment of Title
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- Form 99** The Texas Lawyer’s Creed—A Mandate for Professionalism
- Form 100** Waiver of Notice under Texas Estates Code, Chapter 308, Subchapter A
- Form 101** Personal Representative’s Affidavit of Compliance with Notice Requirements under Texas Estates Code, Chapter 308, Subchapter A
- Form 102** Attorney’s Certificate of Compliance with Notice Requirements under Texas Estates Code, Chapter 308, Subchapter A
- Form 103** Affidavit in Lieu of Inventory, Appraisal, and List of Claims
- Form 104** Affidavit of Service of Citation (Heirship)
- Form 105** Certificate of Service of Citation (Heirship)
- Form 106** Distributee’s Agreement to Independent Administration [and Power of Sale], with Waiver of Citation and Notice (TBA, IBA)
- Form 107** [Distributee’s/Defendant’s] Waiver of Citation and Notice Regarding Proceeding to Declare Heirship (IBA, PDH, RDA)
- Form 108** Application for Independent Administration of Intestate Estate by Agreement and Letters of Independent Administration under Texas Estates Code, Section 401.003 (IBA)
- Form 109** Order Authorizing Independent Administration and Letters of Independent Administration (IBA)
- Form 110** Application for Probate of Will, Independent Administration by Agreement [with Will Annexed], and Issuance of Letters [Testamentary/of Independent Administration] under Texas Estates Code, Section 401.002 (TBA)
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- Form 115** Application and Order to Deposit Funds into Registry of Court
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- Form 117** Distribution Deed
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- Form 119** Distributee's Agreement to Ancillary Independent Administration [and Power of Sale], with Waiver of Citation and Notice
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- Form 134** Proof of Subscribing Witness's Signature
- Form 135** Attorney's Fee Affidavit
- Form 136** Application and Order for Authority to Engage or Employ
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- Form 138** Application and Order to Ratify Expenditure
- Form 139** Interrogatories to Witness to Signature
- Form 140** Interrogatories and Answers to Interrogatories by Witness to Signature
- Form 141** Interrogatories to Witness to Decedent's Handwriting and Signature for Holographic Will
- Form 142** Interrogatories and Answers to Interrogatories by Witness to Decedent's Handwriting and Signature for Holographic Will
- Form 143** Affidavit of Inability or Unwillingness to Serve as Executor
- Form 144** Designation of Administrator
- Form 145** Affidavit of Refusal to Serve as Administrator
- Form 146** Affidavit of Heirship

## LETTERS

- Letter 1** Probate Information List to Client
- Letter 2** Order Letters Testamentary or Letters of Administration
- Letter 3** Confirm Representation and Fee and Outline Anticipated Services (IA)
- Letter 4** Insurance Policy Already Sent for Collection
- Letter 5** Insurance Company Claim Forms
- Letter 6** Order Death Certificates
- Letter 7** Collect Insurance Benefits
- Letter 8** Life Insurance Proceeds to Beneficiary
- Letter 9** Life Insurance Policy *Excluded* from Decedent's Gross Estate
- Letter 10** Return Check to Social Security Administration
- Letter 11** Return Check to Veterans Affairs
- Letter 12** Employee Death Benefits
- Letter 13** Testifying Witness as to Death and Other Facts
- Letter 14** Testifying Witness
- Letter 15** Witness Who Will Not Testify in Court (Initial Letter)
- Letter 16** Interrogatories to Witness
- Letter 17** Witness to Decedent's Handwriting and Signature
- Letter 18** Appointment of Resident Agent
- Letter 19** Advise Applicant, Executor, or Administrator of Hearing

- Letter 20** Oath to Executor or Administrator
- Letter 21** Filing Documents with Probate Clerk
- Letter 22** Thank Witness for Appearing in Court
- Letter 23** Advise of Duties and Actions to Follow (IA)
- Letter 24** Document to Be Signed by Executor, Client, or Administrator
- Letter 25** Request Employer Identification Number
- Letter 26** Notify IRS of Fiduciary Relationship
- Letter 27** Cancel Credit Card or Charge Account
- Letter 28** Inquiries as to Accounts of Married Decedent
- Letter 29** Inquiries as to Accounts of Unmarried Decedent
- Letter 30** Account or Safe Deposit Box Inquiry
- Letter 31** Change of Address to IRS
- Letter 32** Newspaper Notice to Creditors
- Letter 33** Notice to *Secured* Creditor
- Letter 34** Disclaimer to Heir or Beneficiary
- Letter 35** Copy of Disclaimer to Executor or Administrator
- Letter 36** Notify Tenant for Future Payments
- Letter 37** Change Records at Central Appraisal District
- Letter 38** Terminate Brokerage Accounts
- Letter 39** Valuation of Securities
- Letter 40** Change of Address for Securities
- [Letter 41 is reserved for expansion.]*
- Letter 42** Documents for Transfer of Securities
- Letter 43** Transfer of Securities (IA, ADE, AWA, RDA, PDH, TBA, IBA)
- Letter 44** Securities to Transferee
- Letter 45** Insurance on Life of Another
- Letter 46** Notify Debtor for Future Payments
- Letter 47** Documents to Be Signed by Probate Judge
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- [Letters 49 through 56 are reserved for expansion.]*
- Letter 57** Advise Attorney Ad Litem of Hearing
- Letter 58** Dividend Reinvestment Program
- Letter 59** Confirm Representation and Fee and Outline Anticipated Services (ADE, AWA)
- Letter 60** Order Certified Copies (IA, ADE, AWA, TBA)
- Letter 61** Record Proceedings in County Other than County of Probate
- Letter 62** Notice of Termination of Fiduciary Relationship
- Letter 63** Return All Items
- Letter 64** Confirm Representation and Fee and Outline Anticipated Services (MT)
- [Letter 65 is reserved for expansion.]*
- Letter 66** Explain Muniment of Title Procedure and Actions to Follow
- [Letter 67 is reserved for expansion.]*
- Letter 68** Transfer of Securities (MT)
- Letter 69** Order Certified Copies (MT)
- [Letters 70 through 72 are reserved for expansion.]*
- Letter 73** Advise of Duties and Actions to Follow (ADE, AWA)
- Letter 74** Confirm Representation and Fee and Outline Anticipated Services (TDA)
- Letter 75** Claim Form to Creditor
- Letter 76** Verification of Funds on Deposit
- Letter 77** Confirmation of Safekeeping of Funds, Securities, and Other Items
- Letter 78** Copy of Account to Surety
- Letter 79** Discharge of Surety
- [Letters 80 and 81 are reserved for expansion.]*
- Letter 82** Notice to Comptroller
- Letter 83** Confirm Representation and Fee and Outline Anticipated Services (RDA)
- Letter 84** Citation to Newspaper
- Letter 85** Confirm Representation and Fee and Outline Anticipated Services (PDH)

**Letter 86** Order Certified Copies (PDH)  
**Letter 87** Confirm Representation and Fee and Outline Anticipated Services (SE)  
**Letter 88** Transfer of Securities (SE)  
**Letter 89** Order Certified Copies (SE)  
*[Letter 90 is reserved for expansion.]*  
**Letter 91** Order Certified Copies (RDA)  
**Letter 92** Affidavit for Signature (SE)  
**Letter 93** Account for Final Settlement  
**Letter 94** Advise of Duties and Actions to Follow (RDA)  
*[Letters 95 and 96 are reserved for expansion.]*  
**Letter 97** Power of Attorney to IRS  
**Letter 98** Notice of Appointment of Temporary Administrator (TDA)  
**Letter 99** Permissive Notice to *Unsecured* Creditor  
**Letter 100** Advise *Not* to Allow Claim  
*[Letter 101 is reserved for expansion.]*  
**Letter 102** Notify Beneficiary under Decedent's Will  
*[Letter 103 is reserved for expansion.]*  
**Letter 104** Inventory to Beneficiary  
**Letter 105** Order Certified Copies (IBA)  
**Letter 106** Confirm Representation and Fee and Outline Anticipated Services (TBA)  
**Letter 107** Confirm Representation and Fee and Outline Anticipated Services (IBA)  
**Letter 108** Advise of Duties and Actions to Follow (TBA)  
**Letter 109** Advise of Duties and Actions to Follow (IBA)  
**Letter 110** Forward Distribution to Heirs and Beneficiaries  
**Letter 111** Unclaimed Funds to Comptroller  
**Letter 112** Order Copies of Will Previously Probated in Another State or Country  
**Letter 113** Record Will Previously Probated in Another State or Country  
**Letter 114** Confirm Representation and Fee and Outline Anticipated Services (AP—Independent)  
**Letter 115** Confirm Representation and Fee and Outline Anticipated Services (AP—Dependent)  
**Letter 116** Advise of Duties and Actions to Follow (AP—Independent)  
**Letter 117** Advise of Duties and Actions to Follow (AP—Dependent)  
**Letter 118** Confirm Representation and Fee and Outline Anticipated Services (RW)  
**Letter 119** Record Distribution Deed  
**Letter 120** MERP Form to Heir for Signature  
**Letter 121** MERP Authorization to Agency  
**Letter 122** Advise Executor or Administrator of Portability Election (Surviving Spouse)  
**Letter 123** Advise Executor or Administrator of Portability Election (*Not* Surviving Spouse)  
**Letter 124** Order Certified Copies (AP)  
**Letter 125** Response to Preferred Debt and Lien Holder's Attempt to Collect Deficiency  
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**Letter 127** File Will without Application  
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**Letter 133** Client Credit Report Request