

LAW OFFICES OF
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SUBMITTING THIS QUESTIONNAIRE DOES NOT CREATE AN ATTORNEY-CLIENT RELATIONSHIP

Probate & Heirship Questionnaire

Confidential Client Intake — Administering a Loved One's Estate

Our sincere condolences

Please accept our sincere condolences on the passing of your loved one. We understand this is a difficult time, and we will do our best to make the legal process as smooth as possible.

Your answers are confidential. Please complete what you can — partial answers are fine.

A few terms you'll see

Decedent — the person who died.

Applicant — you, the person asking the court to act.

Executor / Administrator — the person the court authorizes to manage and distribute the estate.

Devisee / Beneficiary — a person or organization who receives property.

Heir — a relative entitled to inherit when there is no will.

Please gather these documents (bring copies if you have them)

- ☐ Signed will and any codicils (amendments) — the original if you have it, but a copy is fine if you do not
- ☐ Certified copy of the death certificate
- ☐ A rough family tree / list of relatives
- ☐ A list (even rough) of assets and debts
- ☐ Recent account statements, deeds, and titles
- ☐ Any prior court papers about the estate (from any state)

● If you were just served with a lawsuit

Lawsuits have strict, short deadlines (often only a few weeks to respond). **Failure to respond within the timeframe can have disastrous consequences** (for example, *default*). If you have been served with a lawsuit, **please call us immediately at 210-817-4388**.

Please also be aware that booking a consultation **does not count as a response to your lawsuit**. Until we accept you as a client, **it remains your responsibility to timely respond**.

PART 1: ABOUT YOU (THE APPLICANT)

Your full name _____

Your address (street, city, county, state, ZIP)

Phone

Email

Last 3 digits of your SSN

Driver's license — last 3 digits & state

Why we ask for the last three digits

The court requires the last three digits of the Social Security number and driver's license — for both you and the decedent — to file the probate application. If you would rather not write them here, that is fine; you can give them to us later.

Your relationship to the decedent

Are you the decedent's surviving spouse?

☐ Yes ☐ No

PART 2: ABOUT THE DECEDENT

Decedent's full name

Was the decedent known by any other names? (nicknames; maiden or former married names; a name used after divorce; multiple or Spanish surnames; legal name changes)

Decedent's last permanent address (street, city, county, state) — note: the place of death is not always the permanent address

Date of birth

Date of death

Place of death

Texas county of residence at death

Last 3 digits of decedent's SSN

Decedent's driver's license — last 3 digits & state

As in Part 1, these last three digits are required by the court to open the estate — you may provide them later if you prefer.

Did the decedent leave a valid will?

☐ Yes (with a will) ☐ No will

● There is a deadline to probate a will

In Texas, a will generally must be admitted to probate within **four years** of the date of death (Estates Code § 256.003). After four years, options narrow — often to a “muniment of title” or an heirship proceeding — and only if the applicant was not at fault for the delay. If the death was more than four years ago, please flag it for us right away.

Why we ask about Medicaid

Texas has a Medicaid Estate Recovery Program that can assert a claim against some estates of people who received long-term-care Medicaid.

Note: Medicaid (needs-based assistance, which can seek estate recovery) is different from Medicare (age-based health insurance, which does not). We are asking about Medicaid.

Did the decedent receive Medicaid? ☐ Yes ☐ No

Did the decedent own a business? ☐ Yes ☐ No

PART 3: THE WILL (IF THERE IS ONE)

If there is no will, you may skip this section.

Date of the will _____

Is there a codicil (a later amendment to the will)? ☐ Yes ☐ No

Who is named as executor / executrix? _____

Do you have the ORIGINAL signed will (not just a copy)? ☐ Yes ☐ No

Where is the original will located? (safe-deposit box, our office, home, with a relative, etc.)

Are you aware of any earlier or competing wills, or a later will that may revoke this one? ☐ Yes ☐ No

The original matters, but a copy is still worth bringing

Texas courts strongly prefer the original signed will. If only a copy exists, probate is still sometimes possible — just harder — so bring whatever you have. A will that is “self-proved” (signed with a notarized affidavit) is easier to admit because the witnesses usually do not have to appear.

PART 4: FAMILY & HEIRS

All of the decedent's marriages (note the approximate date any marriage ended and how — divorce or death):

Spouse name	Start (approx.)	Ended (date)	How it ended

All of the decedent's children (biological and adopted, from every relationship):

Child's name	Other parent	DOB (approx.)	Living?

Are any of the decedent's children deceased?

☐ Yes ☐ No

If yes, did that child have children of their own? If so, list their names and addresses:

Why the family tree matters — even when there is a will

When there is no will, Texas law decides who inherits based on the family tree, and community vs. separate property can change the result. But the family tree can matter even when there IS a will — for example, if the will leaves property to a class such as “my children” or “my descendants,” if a child was born or adopted after the will was signed, or if someone is left out without being clearly disinherited (a “pretermitted” heir). In each of those situations, who counts as an heir or descendant decides who actually takes. So please include everyone — even estranged relatives, half-siblings, and children from other relationships.

PART 5: WHAT THE DECEDENT OWNED

In general terms, describe what the decedent owned. A rough description is fine — we will get the specifics later.

Two examples of what we mean

Simple: “Mom owned a house, a car, and a bank account — nothing else.”

Complex: “Dad had a large, complicated estate — houses in several states and another country, oil and gas royalties, cryptocurrency and some intellectual property, several classes of stock and bank accounts at different banks, plus mortgages, debts, and a judgment.”

Your best estimate of the total value of the estate

Did the decedent own real estate in more than one county or state?

☐ Yes ☐ No

If yes, where?

Out-of-state real estate

Real estate in another state can require a separate (“ancillary”) probate there. Tell us about any property outside Texas so we can plan for it.

Did the decedent own securities, stocks, or bonds? ☐ Yes ☐ No

Did the decedent have a 401(k), IRA, or pension? ☐ Yes ☐ No

Did the decedent have significant digital assets (cryptocurrency, online accounts, a digital business)? ☐ Yes ☐ No

If yes, please give us a little more information:

PART 6: DEBTS & WHAT KIND OF PROBATE IS NEEDED

Did the decedent owe debts when he or she passed away (mortgage, credit cards, taxes, medical bills)? ☐ Yes ☐ No

If yes, roughly how much, and to whom?

Is there a surviving spouse or minor child living in the home (homestead)? ☐ Yes ☐ No

● Time-sensitive — please flag this now

If a business or rental property has to keep operating, we may need to move quickly to get someone authorized to run it.

Does the estate need to keep operating something right away (a business, rental property)? ☐ Yes ☐ No

Sometimes there may be a simpler path than full probate

Depending on the facts, Texas sometimes allows a streamlined alternative to a full administration — for example a muniment of title, a small estate affidavit, or a determination of heirship. These are not available in every case, and whether one fits depends on the particular circumstances of the estate. Please ask Mr. Reiffert whether any of them might be appropriate for your situation.

Has anyone already started a probate, or been appointed by a court, for this estate (here or in another state)? ☐ Yes ☐ No

Does anyone disagree about the estate, or might anyone contest or assert a competing claim (an heir, a creditor, a former spouse)? ☐ Yes ☐ No

If yes, who?

Does the family generally get along at least “well enough,” or do you anticipate a dispute? ☐ Gets along ☐ Possible dispute

PART 7: ANYTHING ELSE

Is there anything else we should know?

When you've finished

Please either bring this completed form to your meeting or email it back to us — preferably by replying to the email address you received it from. (Our general info@ryanreiffert.com inbox has heavy spam filtering, so a reply to your original sender is most reliable.)

If you have any questions, you are welcome to bring them to your consultation, call us, or ask by email.

THIS IS AN INTAKE QUESTIONNAIRE ONLY. COMPLETING OR SUBMITTING IT DOES NOT CREATE AN ATTORNEY-CLIENT RELATIONSHIP, WHICH BEGINS ONLY WHEN WE SIGN A WRITTEN ENGAGEMENT AGREEMENT. THE INFORMATION ABOVE IS TRUE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.