

CASE NO. \_\_\_\_\_ IN THE ESTATE OF \_\_\_\_\_

DOCKET DATE/TIME: \_\_\_\_\_

NOTES

Application is verified by the applicant [§ 202.007] \_\_\_\_\_  Application contains all required info. [§ 202.005]

Notice Requirements

- o Return of Citation by mail on known persons [§ 202.051] is on file
  - Distributees age 12 and over; or
  - Parent, conservator, or guardian of distributee under 12
- o Waivers of Citation (in lieu of Citation by mail above) [§ 202.052] are on file
  - Signed by persons 18 years of age or older
  - Parent, conservator, or guardian of a distributee under 12
  - NOTE: minors aged 12-17 cannot waive citation
- o Return of Citation by Publication requested and issued [§ 202.052; see also § 51.054(a)] on file
  - Newspaper; and
  - Office of Court Administration
- o Notice of hearing SHALL be served on all interested persons who file a notice of appearance [TRCP 21]

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Answer by Attorney Ad Litem \_\_\_\_\_

Complete and file the Affidavit of Service of Citation [§ 202.057] Proposed Witness Testimony is filed \_\_\_\_\_  
(for in-person hearings only. Not required for remote hearings)

Proposed Order filed

- o Should be signed by the applicant's counsel and the attorney ad litem
- o Shares should be represented in fractions, not percentages.

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**ADMINISTRATION**

Citation by Posting has been requested and received. [§ 303.001] \_\_\_\_\_  Application contains all required info. [§ 301.052]  
o Hearing request is for a date after the return date

Consents to Independent Administration (if applicable) [§ 401.003]

- o NOTE: Distributees must agree to the independent administration and designate a qualified person, firm, or corporation to serve without bond. Merely stating that an independent administration is in the best interest of the estate and NOT designating a person, firm, or corporation to serve without bond is not a proper Consent. [§ 401.003(a)]
- o ALSO NOTE: the APPLICANT must execute a consent if she/he does not sign the application

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Notice Requirements

- o Independent Administrations:
  - All distributees SHALL be served with Citation and Notice unless such person
  - waives citation and notice (of the hearing date) or enters an appearance. [§ 401.004]
- o Dependent Administrations
  - A copy of the application SHALL be served by certified mail return receipt requested or by e-service on all persons who have an equal or higher right to serve: See TEC 304.001 for order of persons qualified to serve Proof of notice to such person shall be e-filed

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o Notice of hearing SHALL be served on all interested persons who file a notice of appearance [TRCP 21]

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Proposed Order filed