

**Information & Instructions: Letter changing address for correspondence and dividend payments**

**PREVIEW**

1. The following letter is used to change the address or addressee for corporate correspondent and the payment of stock dividends.

**Form: Letter changing address for correspondence and dividend payments**

[Date]

[Name and address]

Regarding Estate of \_\_\_\_\_, Deceased

Dear [Salutation]:

**PLEASE DO NOT COPY**

Please change the address on your records for payment of dividends, interest, and the mailing of correspondence to: [Address of transferee] with respect to the following securities:

Registered Description	Name of Company	In Name of
_____	_____	_____

Thank you in advance for your cooperation and assistance.

**THIS DOCUMENT**

Very truly yours

[Attorney's Name]

**§24:8080 Information & Instructions: Letter to a bank to ascertain if the decedent had any accounts at the bank**

1. This letter is used to ascertain if the decedent held bank accounts at the addressee bank and, if so, to determine the monies held in the account(s) at the time of decedent's death.

**THANK YOU**

**§24:8081 Form: Letter to a bank to ascertain if the decedent had any accounts at the bank**

[Date]

[Name and address of addressee]

Regarding Estate of \_\_\_\_\_, Deceased

Date of Death: \_\_\_\_\_

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Dear [Salutation]:

# PREVIEW

Please review your records and advise me if you had either a checking or savings account of the above-named decedent on the specified date of death. If so, please advise the style of the account, account number, and the balance in the account on that date.

I am the [Executor or Administrator] of the decedent's Estate and enclose proof of my appointment.

Thank you in advance for your assistance.

Very truly yours

# PLEASE DO NOT COPY

[Attorney's Name]

## §24:8090 Information & Instructions: Letter to an employer regarding the decedent's employment benefits

1. The following letter is used to advise the employer of the death of the decedent and to ascertain the decedent's employment benefits, including but not limited to, pension, life insurance, profit sharing and stock option benefits.

## §24:8091 Form: Letter to an employer regarding the decedent's employment benefits

# THIS DOCUMENT

[Date]

[Name and address of employer]

Regarding: Estate of \_\_\_\_\_

Dear [Salutation]:

As you may be aware, your employee [name of decedent] "Decedent", died on [Date].

As the executor of [name of decedent's Estate], I must obtain a list of all assets, value them, and then distribute them to decedent's lawful heirs.

# THANK YOU

Please find enclosed a certified copy of the Application for Independent Administration and Letters Testamentary.

Please furnish me with the following information:

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1. Any group term life insurance policy on the life of the decedent which was paid by you and what part, if any, of the proceeds would be included in the decedent's Estate for federal Estate tax purposes.

**PREVIEW**

2. Any group term life insurance policy on the life of the decedent that was not owned by the decedent, and what part, if any, of the proceeds would be included in the decedent's Estate for federal Estate tax purposes.

3. Death benefits, payable other than under a life insurance contract, to the Estate of the decedent or [his or her] named beneficiaries, and what part, if any, of the proceeds would be included in the decedent's Estate for federal Estate tax purposes.

4. Any life insurance policy or policies that the decedent owned on the life of another.

5. Any life insurance and annuity combination plan and what part, if any, of the proceeds would be included in the decedent's Estate for federal Estate tax purposes.

6. Any proceeds from pension and profit sharing plans, and identify what part, if any, of the proceeds would be included in the decedent's Estate for federal Estate tax purposes.

7. Any proceeds payable to the benefit of the Estate of the decedent and identify what part, if any, of the proceeds would be included in the decedent's Estate for federal Estate tax purposes.

8. Any other company benefits that the decedent or the decedent's Estate is entitled to receive from your company.

**PLEASE DO NOT COPY THIS DOCUMENT**

Your assistance in this matter is greatly appreciated. Thank you.

Very truly yours

[Attorney's Name]

**§24:8100 Information & Instructions: Letter to an insurer advising the company of the decedent's death and requesting forms for payment of insurance proceeds**

1. This letter should be sent to the insurance companies who have issued policies on the decedent's life.

**THANK YOU**

2. The letter advises the insurance company of the decedent's death and requests necessary forms and procedures for the payment of the policy benefits.

**§24:8101 Form: Letter to an insurer advising the company of the decedent's death and requesting forms for payment of insurance proceeds**

**LegalFormsForTexas.Com**

[Date]

[Name and address of insurance company]

**PREVIEW**

Regarding Your Policy No. \_\_\_\_\_

Name of Insured: \_\_\_\_\_

Date of Death: \_\_\_\_\_

Dear [Salutation]:

This letter is to advise you of the fact and date of death of the above named insured. Please forward your claim forms and a list of your requirements to effect payment of the policy benefits. Please send any required forms to \_\_\_\_\_

**PLEASE DO NOT COPY**

Thank you in advance for your assistance.

Very truly yours

[Attorney's Name]

**§24:8110 Information & Instructions: Letter to an insurance company transmitting completed proof of loss and claim forms**

1. The following forms are transmitted with this letter which return the completed claim forms and proof of loss to an insurance company.

**THIS DOCUMENT**

**§24:8111 Form: Letter to an insurance company transmitting completed proof of loss and claim forms**

[Date]

[Name and address]

Regarding Your Policy No. \_\_\_\_\_

Name of Insured: \_\_\_\_\_

**THANK YOU**

Date of Death: \_\_\_\_\_

Dear [Salutation]:

In accordance with your instructions you will find the following items enclosed with this letter:

**LegalFormsForTexas.Com**

1. A certified copy of death certificate.

2. The original insurance policy

3. Completed proof of loss forms.

We would appreciate it if you would make payment to the beneficiary in care of this office.

Please furnish this office with triplicate copies of IRS Form 712 for use in the preparation of the final tax returns.

Thank you in advance for your assistance.

Very truly yours  
**PLEASE DO NOT COPY**

[Attorney's Name]

**§24:8200 Information & Instructions: Letter requesting IRS forms for an Estate tax return**

1. The following letter to the insurance company requests IRS forms for the filing of the decedent's Estate tax return.

**§24:8201 Form: Letter requesting IRS forms for an Estate tax return**

**THIS DOCUMENT**

[Name and address of address]

Regarding Your policy number: \_\_\_\_\_

Name of insured: \_\_\_\_\_

Dear [Salutation]:

I have been informed that some percentage interest in the above referenced policy may have been owned by [name of decedent who died on [Date]]. Please review your files to see if this is correct, and if so, please furnish in triplicate copies of IRS Form 712, 38 completed as of that date, for use in the preparation of the final tax returns.

Thank you in advance for your assistance.

Very truly yours  
**LegalFormsForTexas.Com**  
[Attorney's Name]

§24:8203 Information & Instructions: Letter verifying payment of policy benefits

**PREVIEW**

1. The following letter to the insurance company verifies payment of insurance benefits and requests IRS Estate tax return forms.

§24:8204 Form: Letter verifying payment of policy benefits

[Date]

[Name and address of addressee]

Regarding Your Policy No. \_\_\_\_\_

Name of insured: \_\_\_\_\_

Date of Death: \_\_\_\_\_

Dear [Salutation]:

I have been informed that proof of death has been filed with you and that you have already made settlement of the benefits under the above specified policy. Please furnish me, in triplicate, completed copies of IRS Form 712 for use in the preparation of the final tax returns.

Thank you in advance for your assistance.

**THIS DOCUMENT**  
Very truly yours

[Attorney's Name]

§24:8205 Information & Instructions: Letter verifying no insurance policy benefits were payable

1. The following is a letter to an insurance company verifying that no benefits were payable to the beneficiary under the policy. It also requests documentation for the Estate tax return.

§24:8206 Form: Letter verifying no insurance policy benefits were payable

**THANK YOU**

[Date]

[Name and address]

Regarding Estate of \_\_\_\_\_ Deceased

Your policy number: \_\_\_\_\_

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Dear [Salutation]:

# PREVIEW

The undersigned has been commissioned to prepare the Federal Estate Tax Return for the above named Estate.

It is my understanding that for federal Estate tax purposes the Decedent did not possess incidents of ownership in the policy referred to above, but I would appreciate your confirmation of this fact. Would you also please send me photocopies, in duplicate, of that policy.

Thank you in advance for your assistance in this matter.

Very truly yours

# PLEASE DO NOT COPY

[Attorney's Name]

**§24:8500 Information & Instructions: Letter to the Comptroller of Public Accounts regarding a new estate- request a waiver of the state tax lien on the estate**

1. By law, the state of Texas has a lien on assets of the Estate of a decedent pending payment of the state inheritance taxes.

2. The following in may be used to ask the state to waive its lien so that distribution and administration can occur.

# THIS DOCUMENT

**§24:8501 Form: Letter to the Comptroller of Public Accounts regarding a new estate- request a waiver of the state tax lien on the estate**

[Date]

Comptroller of Public Accounts  
Capitol Station  
Austin, Texas 78711

Regarding Estate of \_\_\_\_\_, Deceased

Dear [Salutation]:

# THANK YOU

There are sufficient assets in the above Estate for the payment of all debts and inheritance taxes. Please furnish this Estate with your customary waiver of inheritance tax lien with respect to the following: [specify].

Thank you in advance for your cooperation.

# LegalFormsForTexas.Com

Very truly yours

# PREVIEW

[Attorney's Name]

## §24:8510 Information & Instructions: Letter to the Comptroller for filing of taxes

1. The following form is used to transmit the state inheritance tax return.

## §24:8511 Form: Letter to Comptroller for filing of taxes

[Date]

Comptroller of Public Accounts  
[Address]  
Austin, Texas

# PLEASE DO NOT COPY

Regarding Estate of \_\_\_\_\_, Deceased

Dear [Salutation]:

Enclosed with this letter you will find the original State of Texas Inheritance Tax Return for the above referenced Estate, together with a check payable to the Treasurer of the State of Texas for the amount of the inheritance tax.

Please be kind enough to acknowledge receipt of this enclosure.

Thank you in advance for your assistance.

# THIS DOCUMENT

Very truly yours

[Attorney's Name]

## §24:8520 Information & Instructions: Letter to comptroller of public accounts regarding closing of the Estate

1. The following form notifies the comptroller that the decedent's Estate is closed. The closing letter issued by the Internal Revenue Service should accompany the letter.

# THANK YOU

## §24:8521 Form: Letter to comptroller of public accounts regarding closing of the Estate

[Date]

Comptroller of Public Accounts  
[Address]  
Austin, Texas

# LegalFormsForTexas.Com

Regarding Estate of \_\_\_\_\_ Deceased

**PREVIEW**

Dear [Salutation]:

Enclosed with this letter is a copy of the closing letter issued by the Internal Revenue Service with respect to the above referenced Estate.

Very truly yours

[Attorney's Name]

§24:8609 Information & Instructions Filing letter for Federal Estate tax return and payments

**PLEASE DO NOT COPY**

1. The following form is used to transmit the federal Estate tax return and any monies owed.

**§24:8601 Form: Filing letter for Federal Estate tax return**

[Date]

Internal Revenue Service  
[Address]

Regarding Estate of \_\_\_\_\_ Deceased

**THIS DOCUMENT**

Dear [Salutation]:

Enclosed with this letter you will find the original Federal Estate Tax Return for the above identified Estate, together with a check payable to the Treasurer of the United States for the amount of the Estate tax which is due.

Also enclosed is a certified copy of the decedent's Will, a death certificate and other supporting documents.

Please acknowledge receipt of these enclosures.

**THANK YOU**

Thank you in advance for your attention to this matter.

Very truly yours

**LegalFormsForTexas.Com**

[Attorney's Name]

§24:8610 Information & Instructions: Letter to IRS regarding closing of Estate

**PREVIEW**

1. The following form notifies the Internal Revenue Service that the Estate is closed.

§24:8611 Form: Letter to IRS regarding closing of Estate

[Date]

Internal Revenue Service  
[Address]

Regarding Estate of \_\_\_\_\_, Deceased

Taxpayer Identification No. \_\_\_\_\_

**PLEASE DO NOT COPY**

Dear [Salutation]:

Please be advised that the administration of the above Estate has been completed. Accordingly, please regard this letter as notice of termination of fiduciary relationship.

Very truly yours

[Attorney's Name]

§24:8620 Information & Instructions: Transmittal letter to client returning Estate documents

**THIS DOCUMENT**

1. The following letter documents a return of the Estate's papers to the client.

§24:8621 Form: Transmittal letter to client returning Estate documents

[Date]

[Client's name]  
[Client's address]

**THANK YOU**  
ATTORNEY-CLIENT COMMUNICATION: THIS DOCUMENT AND ITS  
CONTENTS CONSTITUTE LEGALLY PRIVILEGED INFORMATION

Dear [Client's salutation]:

Enclosed please find all of the documents which you previously furnished to me concerning the Estate of [name of decedent].

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If you have any questions, please call me.

# PREVIEW

(Very truly yours)

[Attorney's Name]

## §24:9000 Information & Instructions: Client satisfaction and acknowledgment

1. Use this form to obtain feedback from the client as to the nature and satisfaction of the services received from your law firm.
2. Ideally, the client should complete the questionnaire and sign the disclosure statement before the close of the matter or final hearing, if any.

**PLEASE DO NOT COPY**

§24:9001 Form: Client satisfaction and acknowledgment

[Date]

**ATTORNEY-CLIENT COMMUNICATION: THIS DOCUMENT AND  
ITS CONTENTS CONSTITUTE LEGALLY PRIVILEGED INFORMATION**

[Client's name]  
[Client's address]

Dear [Client's first name]

# THIS DOCUMENT

This letter is designed to make sure you are satisfied with the legal services that we have provided to you concerning the probate matter that we have handled for you.

Please complete the form that is attached to this letter and return it to our office.

If you have any questions concerning any other legal matter, please call me at [Attorney's phone number].

Very truly yours,

# THANK YOU

(Name of attorney)

**CLIENT SATISFACTION QUESTIONNAIRE AND ACKNOWLEDGMENT FORM**

**ATTORNEY-CLIENT COMMUNICATION: THIS DOCUMENT AND  
ITS CONTENTS CONSTITUTE LEGALLY PRIVILEGED INFORMATION**

Date [LegalFormsForTexas.Com](http://LegalFormsForTexas.Com)

Client's name

**PREVIEW**

Attorney's name that handled your legal matter

Why did you chose this law firm to handle the probate matter?

How were you refereed to this office( prior client, yellow pages, newspaper etc.:

Were you adequately informed about the probate rules, procedure and process including tax considerations?

Yes\_\_\_ or No\_\_\_ Please explain your answer

Were all of your questions answered?

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Are you happy with our service?

How would you rate our service? High \_\_\_ Medium \_\_\_ or Low \_\_\_\_. Please explain your answer.

Were the documents prepared as quickly as you expected? Yes \_\_\_ or No \_\_\_\_. Please explain your answer.

Would you recommend our services to others? Yes \_\_\_ or No \_\_\_\_. Please explain your answer.

What could we do to improve our service?

**THIS DOCUMENT**

What other legal services could we provide to you?

**THANK YOU FOR ALLOWING US TO SERVE YOU.**

Individual Acknowledgment:

I have received and read this disclosure statement. I have received all documents, files and other property which is owned by myself or the ward from the law firm that has handled this matter.

I also acknowledge that no further attorney-client relationship exists between myself and the attorney who wrote this letter and that no further or continuing duties are owed to me by the attorney.

**THANK YOU**

Signed on \_\_\_\_\_.

**LegalFormsForTexas.Com**  
[Client's Name]

§24:9003 Form: Client receipt for return of the client's file

**PREVIEW**  
RECEIPT FOR THE RETURN OF THE CLIENT'S FILE

This receipt is to acknowledge that I have picked up my file and all supporting documents pertaining to my legal matter. I understand that no further attorney-client exists between me and [Attorney's name].

Signed on \_\_\_\_\_.

\_\_\_\_\_  
[Client Name]  
**PLEASE DO NOT COPY**

**THIS DOCUMENT**

**THANK YOU**

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