

TEXAS PROBATE SYSTEM MASTER INFORMATION LIST (MIL)

CLIENT _____
 ESTATE OF _____
 DATE OF DEATH _____
 COURT DOCKET NUMBER _____
 _____ COURT OF _____ COUNTY

TYPE OF PROCEEDINGS:

- Testate**
 - INDEPENDENT ADMINISTRATION
 - INDEPENDENT ADMINISTRATION BY AGREEMENT
 - MUNIMENT OF TITLE
 - ADMINISTRATION WITH WILL ANNEXED
 - ADMINISTRATION WITH DEPENDENT EXECUTOR
 - ANCILLARY PROBATE
 - RECORDING WILL PROBATED ELSEWHERE
- Intestate**
 - SMALL ESTATE
 - PROCEEDINGS TO DECLARE HEIRSHIP
 - TEMPORARY DEPENDENT ADMINISTRATION
 - REGULAR DEPENDENT ADMINISTRATION
 - INDEPENDENT ADMINISTRATION BY AGREEMENT

PERSONS TO RECEIVE COPIES OF DOCUMENTS:

- (1) Name _____
 Address _____
 City, state, zip _____
 E-mail _____
 Phone no. _____
 Fax no. _____
- (2) Name _____
 Address _____
 City, state, zip _____
 E-mail _____
 Phone no. _____
 Fax no. _____
- (3) Name _____
 Address _____
 City, state, zip _____
 E-mail _____
 Phone no. _____
 Fax no. _____

Check box when section is completed. Cross through those that do not apply.

- Decedent (D)** 1.0
- D's Will, Estate, and Personal Representatives** 2.0
- D's Family and Devisees** 3.0
- Safe Deposit Box** 4.0
- D's Professional Advisors** 5.0
- Court Proceedings** 6.0
- Real Estate** 7.0
- U.S. Government Savings Bonds** 8.0
- Marketable Securities** 9.0
- Closely Held Corporations** 10.0
- Cash** 11.0
- Judgments, Notes, Accounts Receivable, and Sales under Contract for Deed** 12.0
- Insurance on D's Life** 13.0
- Insurance on Life of Others** 14.0
- Other Insurance** 15.0
- Unincorporated Business Interests** 16.0
- Transportation Equipment** 17.0
- Personal, Household, and Miscellaneous Assets** 18.0
- Employee and Government Benefits and Annuities** 19.0
- Taxable but Unusual Items** 20.0
- Debts and Claims** 21.0
- Funeral Expenses** 22.0
- Expenses of Last Illness** 23.0
- Previously Taxed Property** 24.0
- Expenses of Administration** 25.0
- Taxes for D and for D's Estate** 26.0

This Master Information List (MIL) has spaces to record all information necessary to prepare all documents to be filed in court, various tax forms, and a simple federal estate tax return; to transfer assets to ultimate beneficiaries; and to prepare related correspondence.