

Common Probate Terms

Guardian

A person appointed by the court to administer the estate of a person who died without a will.

Beneficiary

An individual or organization to which a gift of property is made. Person (or organization) receiving benefits under a legal instrument such as a will, trust, or life insurance policy. Except when very small estates are involved, beneficiaries of wills only receive their benefits after the will is examined and approved by the probate court.

Conservator

A person or organization appointed by the court to protect and manage the personal care or financial affairs, or both, of a person determined by the court to be unable to protect and manage their own personal care or financial affairs, or both.

Executor

The person named in a will to carry out the directions as set forth in the will. This person is the personal representative of the decedent's estate.

Community Property

A person dies without a legal will. When a person dies intestate, deciding how their assets will be distributed becomes the responsibility of a state probate court.

Heir

A person who would naturally inherit property through a will, or from another who died without leaving a will.

Trusts

A trust allows a person to place assets under the control of a trustee to be managed and distributed for the benefit of chosen beneficiaries. Trusts help ensure assets are handled according to your wishes and can often avoid probate.

Wills

Intestate- Person who dies without leaving a will.

Testate- Person who dies leaving a will.

Avoid Probate With a Trust

A properly drafted trust allows your assets to pass directly to your loved ones, without the delays, costs, and public nature of probate.

By placing your property into a trust during your lifetime, you retain control while you're alive and ensure a smooth, private transfer after your death.

Trusts can reduce legal fees, speed up distribution, and provide peace of mind that your wishes will be carried out efficiently.

Estate planning attorney Sydney Key helps individuals and families create trusts that transfer assets smoothly, privately, and without delays and public court proceedings that come with Texas probate

Her thoughtful, detail-oriented approach ensures your plan works exactly the way you intend
- when it matters most.

Texas Probate

Estate Planning



**Probate is the legal process
that takes place after
someone dies in Texas**



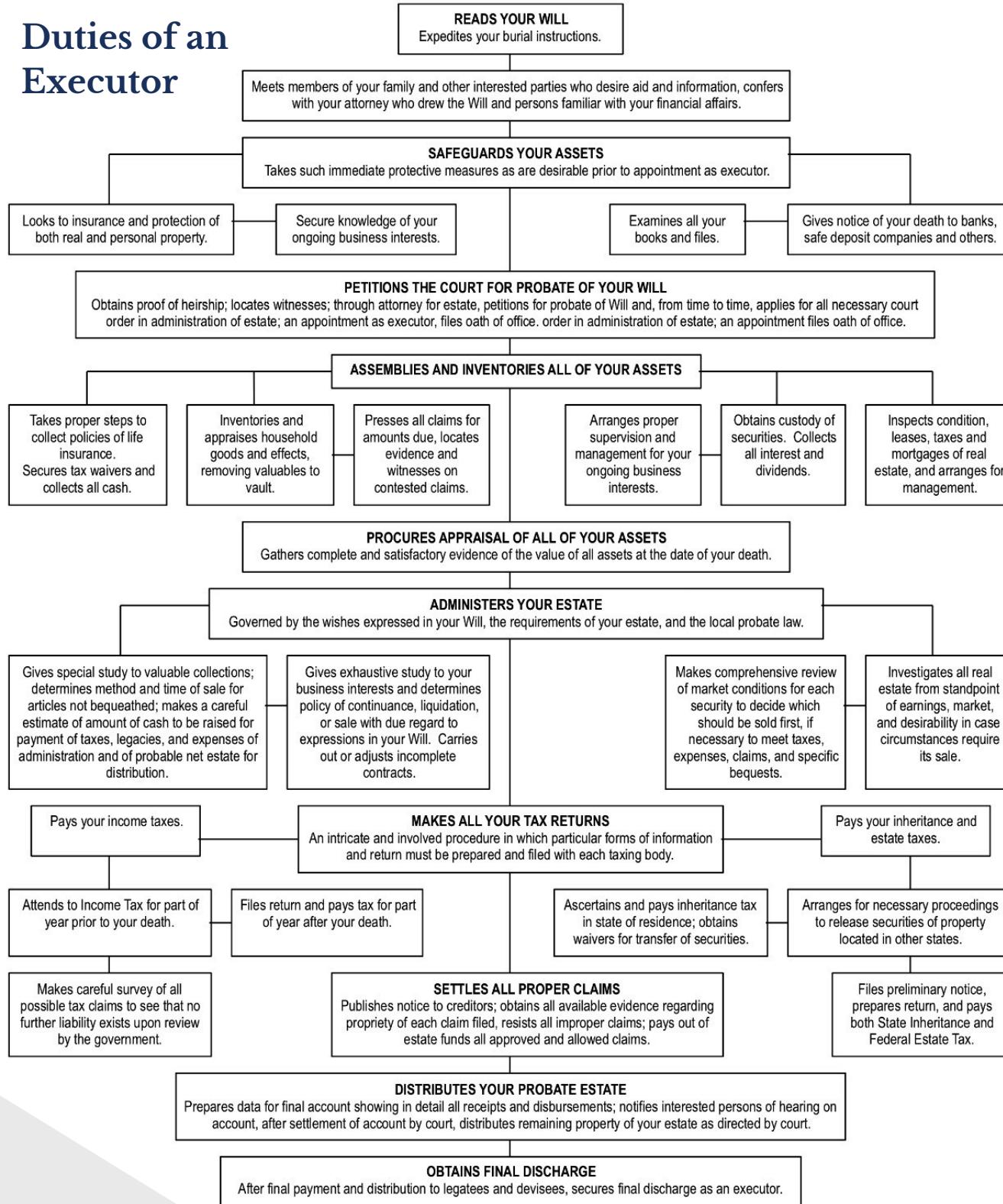
Call Today (325) 230-7156

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**Sydney Key
Estate Planning Attorney**

Duties of an Executor



Texas Probate Timeline

Estimated

Month 1-2

Initial Contact

Prepare Petition / File Petition

Month 2-3

Court Hearing on Petition

Month 2-4

Items Issued
If Uncontested

Letters of Administration
Orders for Probate
Duties and Liabilities
Issue Bond (If Ordered)
Letters of Testamentary
Notice to Creditors

Month 2-4

Notice to Creditors

Month 4-8

Notice to Dept of Health Services
Inventory & Appraisement (I&A)

Month 6-18

Payments and Notices

Pay any State and Federal Taxes
Allow or Reject Creditor Claims
Possible Preliminary Distributions
Notice to Dept of Health Services (If applicable)
Notice to Franchise Tax Board (If applicable)
Claim of Exemption (If assets transfer to a minor)
Receive final tax letter from state and federal

Month 8-16

Getting Closer

File petition: Final Distribution and Accounting
Followed by: Hearing on the petition

Month 9-18

Final Discharge Order
Final Distribution of Funds