

## What is a probate?

Probate is a set of court or government procedures established for the orderly transfer of property from a deceased person to his or her heirs and/or assigns.





# Why probate?

□ Records kept in the course of a probate action are valuable sources of information for genealogists about the deceased and the deceased's family.



### Value of Probate Files for Research

- □ Helps to identify family members
- □ May give wife's maiden name
- □ Establishes the relative economic status of the family
- □ May reveal unknown family relationships
- □ Only record of the ancestor's death



### Documents that may be in a probate file

- □ Wills
- □ Bonds
- Petitions
- Accountings
- Inventories
- □ Orders
- Decrees
- □ Deeds of Distribution



Basic Limitation of Probate

No Property – No Probate



#### What is an "Estate?"

- □ Law must recognize individual property rights
- □ Individuals must have the right to alienate or transfer property to spouse or others after death
- □ Everything owned by the deceased at the time of death is in the "Estate"



### Who are the "Heirs?"

- ☐ Those persons **entitled to inherit** the deceased's property
- □ Established by the law of the **place where the death occurs**, or
- □ Established by the law of the **place where the property is located**, or
- □ Established by the **place where the deceased resided** at the time of death or
- □ Established by a will or other testamentary document



# Where do I go to learn the language?

□ Black's Law Dictionary



#### What is a will?

□A document created by a person before death that attempts to influence the distribution of that person's property after death



### Requirements for a will

- ☐ Must conform to the legal restrictions in force at the time the will is made
- □Must be in writing and witnessed, or
- ■Must be in the handwriting of the deceased (holographic), or
- □ May be oral, if witnessed and written down at the time or shortly thereafter



### Elements of a Will

- Depend on the law of the jurisdiction where the will is made
- □Must refer to or list assets
- □Must identify beneficiaries
- ☐ Must name an executor or personal representative
- □Must be signed and witnessed



