

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION	SENATE VERSION (IE)	CONFERENCE
<p>SECTION 1. Section 21.005, Estates Code, as effective January 1, 2014, is amended to conform to Section 2.54, Chapter 1338 (S.B. 1198), Acts of the 82nd Legislature, Regular Session, 2011, and is further amended to read as follows:</p> <p>Sec. 21.005. APPLICABILITY OF CERTAIN LAWS. <u>(a)</u> Notwithstanding Section 21.002(b) of this code and Section 311.002, Government Code:</p> <p>(1) Section 311.032(c), Government Code, applies to <u>Subtitle</u> [Subtitles] X [and Y], Title 2, and Subtitles Y and Z, Title 3; and</p> <p>(2) Sections 311.005(4) and 311.012(b) and (c), Government Code, apply to <u>Subtitle</u> [Subtitles] X [and Y], Title 2, and Subtitles Y and Z, Title 3.</p> <p><u>(b) Chapter 132, Civil Practice and Remedies Code, does not apply to Subchapter C, Chapter 251.</u></p>	<p>SECTION 1. Same as House version.</p>	
<p>SECTION 2. Notwithstanding the transfer of Section 2, Texas Probate Code, to the Estates Code and redesignation as Section 2 of that code effective January 1, 2014, by Section 2, Chapter 680 (H.B. 2502), Acts of the 81st Legislature, Regular Session, 2009, Subsection (e), Section 2, Texas Probate Code, is transferred to Chapter 32, Estates Code, redesignated as Subsection (d), Section 32.001, Estates Code, and amended to read as follows:</p> <p><u>(d) [(e) Nature of Proceeding.]</u> The administration of the estate of a decedent, from the filing of the application for probate and administration, or for administration, until the decree of final distribution and the discharge of the last personal representative, shall be considered as one proceeding for purposes of jurisdiction. The entire proceeding is a proceeding in rem.</p>	<p>SECTION 2. Same as House version.</p>	

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SECTION 3. Section 32.006, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 32.006. JURISDICTION OF STATUTORY PROBATE COURT WITH RESPECT TO TRUSTS AND POWERS OF ATTORNEY. In a county in which there is a statutory probate court, the statutory probate court has jurisdiction of:

- (1) an action by or against a trustee;
- (2) an action involving an inter vivos trust, testamentary trust, or charitable trust;
- (3) an action by or against an agent or former agent under a power of attorney arising out of the agent's performance of the duties of an agent; and
- (4) an action to determine the validity of a power of attorney or to determine an agent's rights, powers, or duties under a power of attorney.

SECTION 4. Section 51.203(c), Estates Code, as effective January 1, 2014, is amended to read as follows:

(c) At the expiration of the 10-day period prescribed by Subsection (a):

- (1) ~~[commission may issue for taking]~~ the depositions for which the notice was posted may be taken; and
- (2) the judge may file cross-interrogatories if no person appears.

SECTION 5. Section 53.104, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 53.104. APPOINTMENT OF ATTORNEYS AD LITEM. (a) Except as provided by Section 202.009(b), the judge of a probate court may appoint an attorney ad litem in any probate proceeding to represent the interests of any person, including:

SENATE VERSION (IE)

SECTION 3. Same as House version.

SECTION 4. Same as House version.

SECTION 5. Same as House version.

CONFERENCE

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

- (1) a person who has a legal disability under state or federal law;
- (2) a nonresident;
- (3) an unborn or unascertained person; ~~[or]~~
- (4) an unknown heir;
- (5) a missing heir; or
- (6) an unknown or missing person for whom cash is deposited into the court's registry under Section 362.011.
- (b) An attorney ad litem appointed under this section is entitled to reasonable compensation for services provided in the amount set by the court. The court shall:
- (1) tax the compensation as costs in the probate proceeding and order the compensation to be paid out of the estate or by any party at any time during [,-to-be-taxed-as-costs-in] the proceeding; or
- (2) for an attorney ad litem appointed under Subsection (a)(6), order that the compensation be paid from the cash on deposit in the court's registry as provided by Section 362.011.

SECTION 6. Subchapter C, Chapter 53, Estates Code, as effective January 1, 2014, is amended by adding Section 53.107 to read as follows:

Sec. 53.107. INAPPLICABILITY OF CERTAIN RULES OF CIVIL PROCEDURE. The following do not apply to probate proceedings:

(1) Rules 47(c) and 169, Texas Rules of Civil Procedure; and

(2) the portions of Rule 190.2, Texas Rules of Civil Procedure, concerning expedited actions under Rule 169, Texas Rules of Civil Procedure.

SECTION 7. Section 54.051, Estates Code, as effective January 1, 2014, is amended to read as follows:

SECTION 6. Same as House version.

SECTION 7. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

Sec. 54.051. APPLICABILITY OF CERTAIN RULES RELATING TO WITNESSES AND EVIDENCE. Except as provided by Section 51.203, the Texas Rules of Evidence ~~[rules relating to witnesses and evidence that apply in the district court]~~ apply in a proceeding arising under this title to the extent practicable.

SECTION 8. Section 102.004, Estates Code, as effective January 1, 2014, is amended to read as follows:
Sec. 102.004. LIABILITY OF HOMESTEAD FOR DEBTS. If the decedent was survived by a spouse or minor child, the ~~[The]~~ homestead is not liable for the payment of any of the debts of the estate, other than:

- (1) purchase money for the homestead;
- (2) taxes due on the homestead;
- (3) work and material used in constructing improvements on the homestead if the requirements of Section 50(a)(5), Article XVI, Texas Constitution, are met;
- (4) an owelty of partition imposed against the entirety of the property by a court order or written agreement of the parties to the partition, including a debt of one spouse in favor of the other spouse resulting from a division or an award of a family homestead in a divorce proceeding;
- (5) the refinance of a lien against the homestead, including a federal tax lien resulting from the tax debt of both spouses, if the homestead is a family homestead, or from the tax debt of the decedent;
- (6) an extension of credit on the homestead if the requirements of Section 50(a)(6), Article XVI, Texas Constitution, are met; or
- (7) a reverse mortgage.

SECTION 8. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION	SENATE VERSION (IE)	CONFERENCE
<p>SECTION 9. Section 111.051, Estates Code, as effective January 1, 2014, is amended by amending Subdivision (1) and adding Subdivision (1-a) to read as follows:</p> <p>(1) <u>"Contracting third party" means a financial institution, insurance company, plan custodian, plan administrator, or other person who is a party to an account agreement, insurance contract, annuity contract, retirement account, beneficiary designation, or other similar contract the terms of which control whether a nontestamentary transfer has occurred or to whom property passes as a result of a possible nontestamentary transfer. The term does not include a person who is:</u></p> <p><u>(A) an owner of the property subject to a possible nontestamentary transfer; or</u></p> <p><u>(B) a possible recipient of the property subject to a possible nontestamentary transfer.</u></p> <p><u>(1-a) "Employees' trust" means:</u></p> <p>(A) a trust that forms a part of a stock-bonus, pension, or profit-sharing plan under Section 401, Internal Revenue Code of 1954 (26 U.S.C. Section 401 (1986));</p> <p>(B) a pension trust under Chapter 111, Property Code; and</p> <p>(C) an employer-sponsored benefit plan or program, or any other retirement savings arrangement, including a pension plan created under Section 3, Employee Retirement Income Security Act of 1974 (29 U.S.C. Section 1002 (1986)), regardless of whether the plan, program, or arrangement is funded through a trust.</p> <p>SECTION 10. Subchapter B, Chapter 111, Estates Code, is amended by adding Section 111.054 to read as follows:</p> <p><u>Sec. 111.054. APPLICATION OF STATE LAW TO CERTAIN NONTESTAMENTARY TRANSFERS. (a) This</u></p>	<p>SECTION 9. Same as House version.</p> <p>SECTION 10. Same as House version.</p>	

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

section applies if more than 50 percent of the:

(1) assets in an account at a financial institution, in a retirement account, or in another similar arrangement are owned, immediately before a possible nontestamentary transfer of the assets, by one or more persons domiciled in this state; or

(2) interests under an insurance contract, annuity contract, beneficiary designation, or other similar arrangement are owned, immediately before a possible nontestamentary transfer of the interests, by one or more persons domiciled in this state.

(b) Notwithstanding a choice of law or other contractual provision in an agreement prepared or provided by a contracting third party, Texas law applies to determine:

(1) whether a nontestamentary transfer of assets or interests described by Subsection (a) has occurred; and

(2) the ownership of the assets or interests following a possible nontestamentary transfer.

(c) Notwithstanding a choice of law or other contractual provision in an agreement prepared or provided by a contracting third party, any person, including a personal representative, who is asserting an ownership interest in assets or interests described by Subsection (a) subject to a possible nontestamentary transfer shall have access to the courts of this state for a judicial determination of:

(1) whether a nontestamentary transfer of the assets or interests has occurred; or

(2) the ownership of the assets or interests following a possible nontestamentary transfer.

(d) Subsections (a), (b), and (c) do not apply to an obligation:

(1) owed by a party to the contracting third party; or

(2) owed by the contracting third party to a party.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

(e) This section applies to a community property survivorship agreement governed by Chapter 112 and a multiple-party account governed by Chapter 113.

SECTION 11. Section 201.001, Estates Code, as effective January 1, 2014, is amended by amending Subsections (f) and (g) and adding Subsections (i) and (j) to read as follows:

(f) If none of the kindred described by Subsections (b)-(e) survive the person, but the person is survived by a grandparent or a descendant of a grandparent, the person's estate shall be divided into two moieties, with:

(1) one moiety passing to the person's paternal kindred as provided by Subsection (g); and

(2) one moiety passing to the person's maternal kindred as provided by Subsection (h).

(g) The moiety passing to the person's paternal kindred passes in the following order:

(1) if both paternal grandparents survive the person, equal portions pass to the person's paternal grandfather and grandmother;

(2) if only the person's paternal grandfather or grandmother survives the person, the person's estate shall:

(A) be divided into two equal portions, with:

(i) one portion passing to the surviving grandparent; and

(ii) one portion passing to the descendants of the deceased grandparent; or

(B) pass entirely to the surviving grandparent if no descendant of the deceased grandparent survives the person; and

(3) if neither the person's paternal grandfather nor grandmother survives the person, the moiety passing to the decedent's paternal kindred passes to the descendants of the

SECTION 11. **No equivalent provision.** [Deleted by CA2(1)]

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION	SENATE VERSION (IE)	CONFERENCE
<p>person's paternal grandfather and grandmother [and so on without end, passing] in like manner [to the nearest lineal ancestors and their descendants].</p> <p><u>(i) If none of the kindred described by Subsections (b)-(e) survive the person and there is no surviving paternal grandparent or descendant of a paternal grandparent or, in the alternative, there is no surviving maternal grandparent or descendant of a maternal grandparent, the entire estate passes to the decedent's kindred on the side with the surviving grandparent or descendant of a grandparent in the manner provided for a moiety under Subsection (g) or (h).</u></p> <p><u>(j) If none of the kindred described by Subsections (b)-(i) survive the person, the person's estate escheats under Chapter 71, Property Code.</u></p>		
<p>SECTION 12. Section 201.051, Estates Code, as effective January 1, 2014, is amended to read as follows:</p> <p>Sec. 201.051. MATERNAL INHERITANCE. For purposes of inheritance, a child is the child of the child's biological or adopted mother, and the child and the child's issue shall inherit from the child's mother and the child's maternal kindred, both descendants, ascendants, and collateral kindred in all degrees, and they may inherit from the child and the child's issue. <u>However, if a child has intended parents, as defined by Section 160.102, Family Code, under a gestational agreement validated under Subchapter I, Chapter 160, Family Code, the child is the child of the intended mother and not the biological mother or gestational mother unless the biological mother is also the intended mother.</u></p>	<p>SECTION 12. Same as House version.</p>	
<p>SECTION 13. Section 201.052, Estates Code, as effective January 1, 2014, is amended by adding Subsection (a-1) and</p>	<p>SECTION 13. Same as House version.</p>	

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION	SENATE VERSION (IE)	CONFERENCE
<p>amending Subsection (b) to read as follows:</p> <p><u>(a-1) Notwithstanding Subsection (a), if a child has intended parents, as defined by Section 160.102, Family Code, under a gestational agreement validated under Subchapter I, Chapter 160, Family Code, the child is the child of the intended father and not the biological father unless the biological father is also the intended father.</u></p> <p>(b) A child described by Subsection (a) <u>or (a-1)</u> and the child's issue shall inherit from the child's father and the child's paternal kindred, both descendants, ascendants, and collateral kindred in all degrees, and they may inherit from the child and the child's issue.</p>		
<p>SECTION 14. Subchapter A, Chapter 202, Estates Code, as effective January 1, 2014, is amended by adding Section 202.0025 to read as follows:</p> <p><u>Sec. 202.0025. ACTION BROUGHT AFTER DECEDENT'S DEATH. Notwithstanding Section 16.051, Civil Practice and Remedies Code, a proceeding to declare heirship of a decedent may be brought at any time after the decedent's death.</u></p>	<p>SECTION 14. Same as House version.</p>	
<p>SECTION 15. Section 202.004, Estates Code, as effective January 1, 2014, is amended to read as follows:</p> <p>Sec. 202.004. PERSONS WHO MAY COMMENCE PROCEEDING TO DECLARE HEIRSHIP. A proceeding to declare heirship of a decedent may be commenced and maintained under a circumstance specified by Section 202.002 by:</p> <p>(1) the personal representative of the decedent's estate;</p> <p>(2) a person claiming to be a secured creditor or the owner of all or part of the decedent's estate;</p>	<p>SECTION 15. Same as House version.</p>	

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

- (3) if the decedent was a ward with respect to whom a guardian of the estate had been appointed, the guardian of the estate, provided that the proceeding is commenced and maintained in the probate court in which the proceedings for the guardianship of the estate were pending at the time of the decedent's death;
- (4) a party seeking the appointment of an independent administrator under Section 401.003; or
- (5) the trustee of a trust holding assets for the benefit of a decedent.

SECTION 16. Section 202.009, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 202.009. ATTORNEY AD LITEM
~~[REPRESENTATION OF INTERESTS OF CERTAIN PERSONS].~~ (a) ~~The~~ If it appears to the court in a proceeding to declare heirship that there is or may be a living heir whose name or whereabouts is unknown, or that a defendant is an incapacitated person, the court ~~shall~~ may appoint an attorney ad litem in a proceeding to declare heirship ~~[or guardian ad litem]~~ to represent the interests of heirs whose names or locations are unknown ~~[that person. The court may not appoint an attorney ad litem or guardian ad litem unless the court finds that the appointment is necessary to protect the interests of the living heir or incapacitated person].~~

(b) The court may expand the appointment of the ~~[shall appoint an]~~ attorney ad litem appointed under Subsection (a) to include representation of an heir who is an incapacitated person on a finding that the appointment is necessary to protect the interests of the heir ~~[to represent the interests of unknown heirs].~~

SECTION 16. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SECTION 17. Section 202.056, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 202.056. ~~WAIVER OF SERVICE OF CITATION [ON CERTAIN PERSONS NOT PERMITTED]~~. A parent, managing conservator, guardian, attorney ad litem, or guardian ad litem of a minor distributee who:
(1) is younger than 12 years of age [or older, but younger than 19 years of age,] may [not] waive citation required by this subchapter to be served on the distributee; and
(2) is 12 years of age or older may not waive citation required by this subchapter to be served on the distributee.

SECTION 18. Subchapter B, Chapter 202, Estates Code, as effective January 1, 2014, is amended by adding Section 202.057 to read as follows:

Sec. 202.057. AFFIDAVIT OF SERVICE OF CITATION.
(a) A person who files an application under Section 202.005 shall file with the court:
(1) a copy of any citation required by this subchapter and the proof of delivery of service of the citation; and
(2) an affidavit sworn to by the applicant or a certificate signed by the applicant's attorney stating:
(A) that the citation was served as required by this subchapter;
(B) the name of each person to whom the citation was served, if the person's name is not shown on the proof of delivery; and
(C) the name of each person who waived citation under Section 202.056.
(b) The court may not enter an order in the proceeding to declare heirship under Subchapter E until the applicant files the affidavit required by this section.

SENATE VERSION (IE)

SECTION 17. Same as House version.

SECTION 18. Subchapter B, Chapter 202, Estates Code, as effective January 1, 2014, is amended by adding Section 202.057 to read as follows:

Sec. 202.057. AFFIDAVIT OF SERVICE OF CITATION.
(a) A person who files an application under Section 202.005 shall file with the court:
(1) a copy of any citation required by this subchapter and the proof of delivery of service of the citation; and
(2) an affidavit sworn to by the applicant or a certificate signed by the applicant's attorney stating:
(A) that the citation was served as required by this subchapter;
(B) the name of each person to whom the citation was served, if the person's name is not shown on the proof of delivery; and
(C) the name of each person who waived citation under Section 202.056.
(b) The court may not enter an order in the proceeding to declare heirship under Subchapter E until the affidavit or certificate required by Subsection (a) is filed. [CA1(1)]

CONFERENCE

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION	SENATE VERSION (IE)	CONFERENCE
<p>SECTION 19. Section 202.151, Estates Code, as effective January 1, 2014, is amended to read as follows:</p> <p>Sec. 202.151. [WRITTEN] EVIDENCE IN PROCEEDING TO DECLARE HEIRSHIP. (a) The court may require that [all or] any <u>testimony</u> [part of the evidence] admitted <u>as evidence</u> in a proceeding to declare heirship be [÷</p> <p>[(1)] reduced to writing and subscribed and sworn to by the witnesses, respectively [÷; and</p> <p>[(2)] filed in the proceeding and recorded in the judge's probate docket].</p> <p><u>(b) Testimony in a proceeding to declare heirship must be taken in open court, by deposition in accordance with Section 51.203, or in accordance with the Texas Rules of Civil Procedure.</u></p>	<p>SECTION 19. Same as House version.</p>	
<p>SECTION 20. Sections 204.151 and 204.152, Estates Code, as effective January 1, 2014, are amended to read as follows:</p> <p>Sec. 204.151. APPLICABILITY OF SUBCHAPTER. This subchapter applies in a proceeding to declare heirship of a decedent only with respect to an individual who[÷</p> <p>[(1)] petitions the court for a determination of right of inheritance as authorized by Section 201.052(c); and</p> <p>[(2)] claims[÷</p> <p>[(A)] to be a biological child of the decedent <u>or claims</u>[÷; but with respect to whom a parent child relationship with the decedent was not established as provided by Section 160.201, Family Code; or</p> <p>[(B)] to inherit through a biological child of the decedent[÷; if a parent child relationship between the individual through whom the inheritance is claimed and the decedent was not established as provided by Section 160.201, Family Code].</p> <p>Sec. 204.152. <u>PRESUMPTION; [REQUIRED FINDINGS IN</u></p>	<p>SECTION 20. Same as House version.</p>	

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION	SENATE VERSION (IE)	CONFERENCE
<p>ABSENCE—OF] REBUTTAL [EVIDENCE]. <u>The presumption under Section 160.505, Family Code, that applies in establishing a parent-child relationship also applies in determining heirship in the probate court using the results of genetic testing ordered with respect to an individual described by Section 204.151, and the presumption may be rebutted in the same manner provided by Section 160.505, Family Code. [Unless the results of genetic testing of another individual who is an heir of the decedent who is the subject of a proceeding to declare heirship to which this subchapter applies are admitted as rebuttal evidence, the court shall find that the individual described by Section 204.151:</u></p> <p>[(1) is an heir of the decedent, if the results of genetic testing ordered under Subchapter B identify a tested individual who is an heir of the decedent as the ancestor of the individual described by Section 204.151; or</p> <p>[(2) is not an heir of the decedent, if the results of genetic testing ordered under Subchapter B exclude a tested individual who is an heir of the decedent as the ancestor of the individual described by Section 204.151.]</p>		
<p>SECTION 21. Section 253.001, Estates Code, as effective January 1, 2014, is amended by adding Subsection (c) to read as follows:</p> <p><u>(c) Any portion of a court order that purports to prohibit a person from executing a new will or a codicil to an existing will is void and may be disregarded without penalty or sanction of any kind.</u></p>	<p>SECTION 21. Same as House version.</p>	
<p>SECTION 22. The heading to Section 256.052, Estates Code, as effective January 1, 2014, is amended to read as follows:</p> <p>Sec. 256.052. CONTENTS OF APPLICATION FOR</p>	<p>SECTION 22. Same as House version.</p>	

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

PROBATE OF ~~[WRITTEN]~~ WILL ~~[GENERALLY]~~.

SECTION 23. Section 256.052(a), Estates Code, as effective January 1, 2014, is amended to read as follows:

(a) An application for the probate of a ~~[written]~~ will must state and aver the following to the extent each is known to the applicant or can, with reasonable diligence, be ascertained by the applicant:

- (1) each applicant's name and domicile;
- (2) the testator's name, domicile, and, if known, age, on the date of the testator's death;
- (3) the fact, time, and place of the testator's death;
- (4) facts showing that the court with which the application is filed has venue;
- (5) that the testator owned property, including a statement generally describing the property and the property's probable value;
- (6) the date of the will;
- (7) the name, state of residence, and physical address where service can be had ~~[residence]~~ of the ~~[:~~
~~[(A) any]~~ executor named in the will or other ~~[, if no executor is named, of the]~~ person to whom the applicant desires that letters be issued; ~~[and]~~
- (8) the name of ~~[(B)]~~ each subscribing witness to the will, if any;
- (9) [(8)] whether one or more children born to or adopted by the testator after the testator executed the will survived the testator and, if so, the name of each of those children;
- (10) [(9)] whether a marriage of the testator was ever dissolved after the will was made and, if so, when and from whom;
- (11) [(10)] whether the state, a governmental agency of the

SECTION 23. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION	SENATE VERSION (IE)	CONFERENCE
state, or a charitable organization is named in the will as a devisee; and (12) [(44)] that the executor named in the will, the applicant, or another person to whom the applicant desires that letters be issued is not disqualified by law from accepting the letters.		
SECTION 24. The heading to Section 256.053, Estates Code, as effective January 1, 2014, is amended to read as follows: Sec. 256.053. FILING OF [WRITTEN] WILL WITH APPLICATION FOR PROBATE GENERALLY REQUIRED.	SECTION 24. Same as House version.	
SECTION 25. Section 256.053(a), Estates Code, as effective January 1, 2014, is amended to read as follows: (a) An applicant for the probate of a [written] will shall file the will with the application if the will is in the applicant's control.	SECTION 25. Same as House version.	
SECTION 26. Section 256.054, Estates Code, as effective January 1, 2014, is amended to read as follows: Sec. 256.054. ADDITIONAL APPLICATION REQUIREMENTS WHEN NO [WRITTEN] WILL IS PRODUCED. In addition to the requirements for an application under Section 256.052, if an applicant for the probate of a [written] will cannot produce the will in court, the application must state: (1) the reason the will cannot be produced; (2) the contents of the will, as far as known; and (3) the name, age, marital status, and address, if known, and the relationship to the testator, if any, of: (A) each devisee; (B) each person who would inherit as an heir of the testator in	SECTION 26. Same as House version.	

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

the absence of a valid will; and
(C) in the case of partial intestacy, each heir of the testator.

SECTION 27. Section 256.152(c), Estates Code, as effective January 1, 2014, is amended to read as follows:

(c) As an alternative to Subsection (b) [For purposes of Subsection (b)], a will executed in another state or a foreign country is considered self-proved without further evidence of the law of the other state or foreign country if the will, or an affidavit of the testator and attesting witnesses attached or annexed to the will, provides that:

(1) the testator declared that the testator signed the instrument as the testator's will, the testator signed it willingly or willingly directed another to sign for the testator, the testator executed the will as the testator's free and voluntary act for the purposes expressed in the instrument, the testator is of sound mind and under no constraint or undue influence, and the testator is eighteen years of age or over or, if under that age, was or had been lawfully married, or was then a member of the armed forces of the United States, an auxiliary of the armed forces of the United States, or the United States Maritime Service; and

(2) the witnesses declared that the testator signed the instrument as the testator's will, the testator signed it willingly or willingly directed another to sign for the testator, each of the witnesses, in the presence and hearing of the testator, signed the will as witness to the testator's signing, and to the best of their knowledge the testator was of sound mind and under no constraint or undue influence, and the testator was eighteen years of age or over or, if under that age, was or had been lawfully married, or was then a member of the armed forces of the United States, an auxiliary of the armed forces of

SECTION 27. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

the United States, or the United States Maritime Service.

SECTION 28. Section 256.153, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 256.153. PROOF OF EXECUTION OF ~~[AUTHORIZED METHODS OF PROVING]~~ ATTESTED ~~[WRITTEN]~~ WILL. (a) An attested ~~[written]~~ will produced in court that is not self-proved as provided by this title may be proved in the manner provided by this section.

(b) A will described by Subsection (a) may be proved by the sworn testimony or affidavit of one or more of the subscribing witnesses to the will taken in open court.

(c) If all the witnesses to a will described by Subsection (a) are nonresidents of the county or the witnesses who are residents of the county are unable to attend court, the will may be proved:

(1) by the sworn testimony of one or more of the witnesses by written or oral deposition taken in accordance with Section 51.203 or the Texas Rules of Civil Procedure ~~[in the same manner and under the same rules as depositions are taken in other civil actions]~~;

(2) if no opposition in writing to the will is filed on or before the date set for the hearing on the will, by the sworn testimony or affidavit of two witnesses taken in open court, or by deposition as provided by Subdivision (1), to the signature or the handwriting evidenced by the signature of:

(A) one or more of the attesting witnesses; or

(B) the testator, if the testator signed the will; or

(3) if it is shown under oath to the court's satisfaction that, after a diligent search was made, only one witness can be found who can make the required proof, by the sworn testimony or affidavit of that witness taken in open court, or

SECTION 28. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

by deposition as provided by Subdivision (1), to a signature, or the handwriting evidenced by a signature, described by Subdivision (2).

(d) If none of the witnesses to a will described by Subsection (a) are living, or if each of the witnesses is a member of the armed forces or the armed forces reserves of the United States, an auxiliary of the armed forces or armed forces reserves, or the United States Maritime Service and is beyond the court's jurisdiction, the will may be proved:

(1) by two witnesses to the handwriting of one or both of the subscribing witnesses to the will or the testator, if the testator signed the will, by:

(A) sworn testimony or affidavit taken in open court; or

(B) written or oral deposition taken in accordance with Section 51.203 or the Texas Rules of Civil Procedure ~~[in the same manner and under the same rules as depositions are taken in other civil actions]~~; or

(2) if it is shown under oath to the court's satisfaction that, after a diligent search was made, only one witness can be found who can make the required proof, by the sworn testimony or affidavit of that witness taken in open court, or by deposition as provided by Subdivision (1), to a signature or the handwriting described by Subdivision (1).

(e) A witness being deposed for purposes of proving the will as provided by Subsection (c) or (d) may testify by referring to a certified copy of the will, without the judge requiring the original will to be removed from the court's file and shown to the witness.

SECTION 29. Section 256.154, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 256.154. PROOF OF EXECUTION ~~[AUTHORIZED~~

SECTION 29. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

~~METHODS]~~ OF ~~[PROVING]~~ HOLOGRAPHIC WILL. (a) A will wholly in the handwriting of the testator that is not self-proved as provided by this title may be proved by two witnesses to the testator's handwriting. The evidence may be by:

(1) sworn testimony or affidavit taken in open court; or

(2) if the witnesses are nonresidents of the county or are residents who are unable to attend court, written or oral deposition taken in accordance with Section 51.203 or the Texas Rules of Civil Procedure ~~[in the same manner and under the same rules as depositions are taken in other civil actions]~~.

(b) A witness being deposed for purposes of proving the will as provided by Subsection (a)(2) may testify by referring to a certified copy of the will, without the judge requiring the original will to be removed from the court's file and shown to the witness.

SECTION 30. Section 256.155(a), Estates Code, as effective January 1, 2014, is amended to read as follows:

(a) This section, rather than Sections 256.153(c) and (d) and 256.154 regarding the taking of depositions ~~[under the same rules as depositions in other civil actions]~~, applies if no contest has been filed with respect to an application for the probate of a will.

SECTION 31. Section 256.156, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 256.156. PROOF OF ~~[WRITTEN]~~ WILL NOT PRODUCED IN COURT. (a) A ~~[written]~~ will that cannot be produced in court must be proved in the same manner as provided in Section 256.153 for an attested ~~[written]~~ will or

SECTION 30. Same as House version.

SECTION 31. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

Section 256.154 for a holographic will, as applicable. The same amount and character of testimony is required to prove the ~~[written]~~ will not produced in court as is required to prove a ~~[written]~~ will produced in court.

(b) In addition to the proof required by Subsection (a):

(1) the cause of the nonproduction of a ~~[written]~~ will not produced in court must be proved, which must be sufficient to satisfy the court that the will cannot by any reasonable diligence be produced; and

(2) the contents of the will must be substantially proved by the testimony of a credible witness who has read either the original or a copy of the will, has heard the will read, or can identify a copy of the will.

SECTION 32. Section 256.203, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 256.203. ESTABLISHING CONTENTS OF WILL NOT IN COURT'S CUSTODY. If for any reason a ~~[written]~~ will is not in the court's custody, the court shall find the contents of the will by written order. Certified copies of the contents as established by the order may be:

(1) recorded in other counties; and

(2) used in evidence, as certified copies of ~~[written]~~ wills in the custody of the court may be used.

SECTION 33. Section 257.052, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 257.052. FILING OF ~~[WRITTEN]~~ WILL WITH APPLICATION GENERALLY REQUIRED. (a) An applicant for the probate of a ~~[written]~~ will as a muniment of title shall file the will with the application if the will is in the applicant's control.

SECTION 32. Same as House version.

SECTION 33. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

(b) A will filed under Subsection (a) must remain in the custody of the county clerk unless removed from the clerk's custody by court order.

SECTION 34. Section 257.053, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 257.053. ADDITIONAL APPLICATION REQUIREMENTS WHEN NO ~~[WRITTEN]~~ WILL IS PRODUCED. In addition to the requirements for an application under Section 257.051, if an applicant for the probate of a ~~[written]~~ will as a muniment of title cannot produce the will in court, the application must state:

- (1) the reason the will cannot be produced;
- (2) the contents of the will, to the extent known; and
- (3) the name, age, marital status, and address, if known, and the relationship to the testator, if any, of:
 - (A) each devisee;
 - (B) each person who would inherit as an heir of the testator in the absence of a valid will; and
 - (C) in the case of partial intestacy, each heir of the testator.

SECTION 35. Subchapter D, Chapter 301, Estates Code, as effective January 1, 2014, is amended by adding Section 301.155 to read as follows:

Sec. 301.155. AUTHORIZED METHODS OF PROOF. A fact contained in an application for issuance of letters testamentary or of administration or any other fact required to be proved by this subchapter may be proved by the sworn testimony of a witness with personal knowledge of the fact that is:

- (1) taken in open court; or
- (2) if proved under oath to the satisfaction of the court that

SECTION 34. Same as House version.

SECTION 35. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

the witness is unavailable, taken by deposition on written questions in accordance with Section 51.203 or the Texas Rules of Civil Procedure.

SECTION 36. Section 304.001(c), Estates Code, as effective January 1, 2014, is amended to read as follows:

(c) If persons ~~[applicants for letters testamentary or of administration]~~ are equally entitled to letters testamentary or of administration ~~[the letters]~~, the court:

- (1) shall grant the letters to the person ~~[applicant]~~ who, in the judgment of the court, is most likely to administer the estate advantageously; or
- (2) may grant the letters to two or more of those persons ~~[applicants]~~.

SECTION 37. Section 305.002(a), Estates Code, as effective January 1, 2014, is amended to read as follows:

(a) A personal representative, other than an executor described by Subsection (b), is considered to have qualified when the representative has:

- (1) taken and filed the oath prescribed by Subchapter B;
- (2) filed ~~[given]~~ the required bond with the clerk; and
- (3) obtained the judge's approval of the bond ~~[; and~~
- ~~[(4) filed the bond with the clerk].~~

SECTION 38. Section 305.003, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 305.003. PERIOD FOR TAKING OATH ~~[AND GIVING BOND]~~. An oath may be taken and subscribed ~~[and a bond may be given and approved]~~ at any time before:

- (1) the 21st day after the date of the order granting letters testamentary or of administration, as applicable; or

SECTION 36. Same as House version.

SECTION 37. Same as House version.

SECTION 38. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

(2) the letters testamentary or of administration, as applicable, are revoked for a failure to qualify within the period allowed.

SECTION 39. Subchapter A, Chapter 305, Estates Code, as effective January 1, 2014, is amended by adding Section 305.004 to read as follows:

Sec. 305.004. PERIOD FOR GIVING BOND. (a) A bond may be filed with the clerk at any time before:

(1) the 21st day after:

(A) the date of the order granting letters testamentary or of administration, as applicable; or

(B) the date of any order modifying the bond requirement; or

(2) the date letters testamentary or of administration, as applicable, are revoked for a failure to qualify within the period allowed.

(b) The court shall act promptly to review a bond filed as provided by Subsection (a) and, if acceptable, shall approve the bond.

(c) If no action has been taken by the court on the bond before the 21st day after the date the bond is filed, the person appointed personal representative may file a motion requiring the judge of the court in which the bond was filed to specify on the record the reason or reasons for the judge's failure to act on the bond. The hearing on the motion must be held before the 11th day after the date the motion is filed.

SECTION 40. Section 308.054(b), Estates Code, as effective January 1, 2014, is amended to read as follows:

(b) Notice given under Subsection (a) must:

(1) expressly state that the creditor must present the claim before the 121st day [within four months] after the date of the receipt of the notice or the claim is barred, if the claim is not

SENATE VERSION (IE)

SECTION 39. Same as House version.

SECTION 40. Same as House version.

CONFERENCE

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION	SENATE VERSION (IE)	CONFERENCE
<p>barred by the general statutes of limitation; and</p> <p>(2) include:</p> <p>(A) the date the letters testamentary or of administration held by the personal representative were issued to the representative;</p> <p>(B) the address to which the claim may be presented; and</p> <p>(C) an instruction of the representative's choice that the claim be addressed in care of:</p> <p>(i) the representative;</p> <p>(ii) the representative's attorney; or</p> <p>(iii) "Representative, Estate of _____" (naming the estate).</p> <p>SECTION 41. Section 309.051(a), Estates Code, as effective January 1, 2014, is amended to read as follows:</p> <p>(a) Except as provided by Subsection (c) or <u>Section 309.056</u> or unless a longer period is granted by the court, before the 91st day after the date the personal representative qualifies, the representative shall prepare and file with the court clerk a single written instrument that contains a verified, full, and detailed inventory of all estate property that has come into the representative's possession or of which the representative has knowledge. The inventory must:</p> <p>(1) include:</p> <p>(A) all estate real property located in this state; and</p> <p>(B) all estate personal property regardless of where the property is located; and</p> <p>(2) specify which portion of the property, if any, is separate property and which, if any, is community property.</p> <p>SECTION 42. Section 309.056, Estates Code, as effective January 1, 2014, is amended by amending Subsection (b) and adding Subsection (d) to read as follows:</p>	<p>SECTION 41. Same as House version.</p> <p>SECTION 42. Same as House version.</p>	

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

(b) Notwithstanding Sections 309.051 and 309.052, or any contrary provision in a decedent's will that does not specifically prohibit the filing of an affidavit described by this subsection, if there are no unpaid debts, except for secured debts, taxes, and administration expenses, at the time the inventory is due, including any extensions, an independent executor may file with the court clerk, in lieu of the inventory, appraisement, and list of claims, an affidavit stating that all debts, except for secured debts, taxes, and administration expenses, are paid and that all beneficiaries have received a verified, full, and detailed inventory and appraisement. The affidavit in lieu of the inventory, appraisement, and list of claims must be filed within the 90-day period prescribed by Section 309.051(a), unless the court grants an extension.

(d) An independent executor is not liable for choosing to file:

(1) an affidavit under this section in lieu of filing an inventory, appraisement, and list of claims, if permitted by law; or

(2) an inventory, appraisement, and list of claims in lieu of filing an affidavit under this section.

SECTION 43. Subchapter B, Chapter 309, Estates Code, as effective January 1, 2014, is amended by adding Section 309.057 to read as follows:

Sec. 309.057. PENALTY FOR FAILURE TO TIMELY FILE INVENTORY, APPRAISEMENT, AND LIST OF CLAIMS OR AFFIDAVIT IN LIEU OF. (a) This section applies only to a personal representative, including an independent executor or administrator, who does not file an inventory, appraisement, and list of claims or affidavit in lieu of the inventory, appraisement, and list of claims, as applicable, within the period prescribed by Section 309.051 or

SECTION 43. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

any extension granted by the court.

(b) Any person interested in the estate on written complaint, or the court on the court's own motion, may have a personal representative to whom this section applies cited to file the inventory, appraisalment, and list of claims or affidavit in lieu of the inventory, appraisalment, and list of claims, as applicable, and show cause for the failure to timely file.

(c) If the personal representative does not file the inventory, appraisalment, and list of claims or affidavit in lieu of the inventory, appraisalment, and list of claims, as applicable, after being cited or does not show good cause for the failure to timely file, the court on hearing may fine the representative in an amount not to exceed \$1,000.

(d) The personal representative and the representative's sureties, if any, are liable for any fine imposed under this section and for all damages and costs sustained by the representative's failure. The fine, damages, and costs may be recovered in any court of competent jurisdiction.

SECTION 44. Sections 309.103(a) and (b), Estates Code, as effective January 1, 2014, are amended to read as follows:

(a) Any interested person who considers an inventory, appraisalment, or list of claims or an affidavit in lieu of the inventory, appraisalment, and list of claims ~~[filed for the estate]~~ to be erroneous or unjust in any particular may:

(1) file a written complaint setting forth the alleged erroneous or unjust item; and

(2) have the personal representative cited to appear before the court and show cause why the item should not be corrected.

(b) On the hearing of the complaint, if the court is satisfied from the evidence that the inventory, appraisalment, or list of claims or an affidavit in lieu of the inventory, appraisalment,

SECTION 44. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

and list of claims is erroneous or unjust as alleged in the complaint, the court shall enter an order:

- (1) specifying the erroneous or unjust item and the corrections to be made; and
- (2) if the complaint relates to an inventory, appraisalment, or list of claims, appointing appraisers to make a new appraisalment correcting the erroneous or unjust item and requiring the filing of the new appraisalment before the 21st day after the date of the order.

SECTION 45. Section 353.101(d), Estates Code, as effective January 1, 2014, is amended to read as follows:

- (d) A family allowance may not be made for:
- (1) the decedent's surviving spouse, if the surviving spouse has separate property adequate for the surviving spouse's maintenance;
 - (2) the decedent's minor children, if the minor children have property in their own right adequate for the children's maintenance; or
 - (3) any of the decedent's adult incapacitated children, if:
 - (A) the adult incapacitated child has property in the person's own right adequate for the person's maintenance; or
 - (B) at the time of the decedent's death, the decedent was not supporting the adult incapacitated child.

SECTION 46. Section 355.060, Estates Code, as effective January 1, 2014, is amended to read as follows:
Sec. 355.060. UNSECURED CLAIMS BARRED UNDER CERTAIN CIRCUMSTANCES. If a personal representative gives a notice permitted by Section 308.054 to an unsecured creditor for money and the creditor's claim is not presented before the 121st day [~~within four months~~] after the date of

SECTION 45. Same as House version.

SECTION 46. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

receipt of the notice, the claim is barred.

SECTION 47. Section 361.155, Estates Code, as effective January 1, 2014, is amended by amending Subsection (b) and adding Subsection (c) to read as follows:

(b) Except as otherwise provided by this subsection, an appointee who files an inventory, appraisal, and list of claims under Subsection (a) shall set out in the inventory the appointee's appraisal of the fair market value of each item in the inventory on the date of the appointee's qualification. If an inventory, appraisal, and list of claims has not been filed by any former personal representative, the appointee shall set out the inventory as provided by Sections 309.051 and 309.052.

(c) On the application of any person interested in the estate, the court shall, in an order appointing a successor representative of an estate, appoint appraisers as in an original appointment.

SECTION 48. Section 362.005, Estates Code, as effective January 1, 2014, is amended to read as follows:

Sec. 362.005. CITATION AND NOTICE ON PRESENTATION OF ACCOUNT. (a) On the presentation of an account for final settlement by a temporary or permanent personal representative, the county clerk shall issue citation to the persons and in the manner provided by Subsection (b) [~~Subsections (c) and (d)~~].

(b) Citation issued under Subsection (a) must:

(1) contain:

(A) [~~(1)~~] a statement that an account for final settlement has been presented;

(B) [~~(2)~~] the time and place the court will consider the

SECTION 47. Same as House version.

SECTION 48. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

account; and
~~(C) [(3)]~~ a statement requiring the person cited to appear and contest the account, if the person wishes to contest the account; and
~~(2) be given~~:-
~~[(e) The personal representative shall give notice]~~ to each heir or beneficiary of the decedent by certified mail, return receipt requested, unless the court by written order directs another method of service ~~[type of notice]~~ to be given~~[-The notice must include a copy of the account for final settlement]~~.
(c) The personal representative shall also provide to each person entitled to citation under Subsection (b) a copy of the account for final settlement either by:
(1) certified mail, return receipt requested; or
(2) electronic delivery, including facsimile or e-mail.
(d) The court by written order shall require additional notice if the court considers the additional notice necessary.
(e) The court may allow the waiver of citation ~~[notice]~~ of an account for final settlement in a proceeding concerning a decedent's estate.
(f) The personal representative shall file an affidavit sworn to by the personal representative or a certificate signed by the personal representative's attorney stating:
(1) that the citation was given as required by this section;
(2) the name of each person to whom the citation was given, if the person's name is not shown on the proof of delivery;
(3) the name of each person executing a waiver of citation;
and
(4) that each person entitled to citation was provided a copy of the account for final settlement, indicating the method of delivery for each person.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION	SENATE VERSION (IE)	CONFERENCE
<p>SECTION 49. Section 362.011, Estates Code, as effective January 1, 2014, is amended to read as follows:</p> <p>Sec. 362.011. PARTITION AND DISTRIBUTION OF ESTATE; <u>DEPOSIT IN COURT'S REGISTRY.</u> (a) If, on final settlement of an estate, any of the estate remains in the personal representative's possession, the court shall order that a partition and distribution be made among the persons entitled to receive that part of the estate.</p> <p><u>(b) The court shall order the personal representative to convert into money any remaining nonmonetary assets to which a person who is unknown or missing is entitled. The procedures in Chapter 356 apply to the conversion of nonmonetary assets under this subsection.</u></p> <p><u>(c) The court shall order the personal representative to deposit in an account in the court's registry all money, including the proceeds of any conversion under Subsection (b), to which a person who is unknown or missing is entitled. The court shall hold money deposited in an account under this subsection until the court renders:</u></p> <p><u>(1) an order requiring money in the account to be paid to the previously unknown or missing person who is entitled to the money; or</u></p> <p><u>(2) another order regarding the disposition of the money.</u></p>	<p>SECTION 49. Same as House version.</p>	
<p>SECTION 50. Section 362.013, Estates Code, as effective January 1, 2014, is amended to read as follows:</p> <p>Sec. 362.013. DISCHARGE OF PERSONAL REPRESENTATIVE WHEN ESTATE FULLY ADMINISTERED. The court shall enter an order discharging a personal representative from the representative's trust and declaring the estate closed when:</p> <p>(1) the representative has fully administered the estate in</p>	<p>SECTION 50. Same as House version.</p>	

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

accordance with this title and the court's orders;
(2) the representative's account for final settlement has been approved; and
(3) the representative has:
(A) delivered all of the estate remaining in the representative's possession to the person or persons entitled to receive that part of the estate; and
(B) with respect to the portion of the estate distributable to an unknown or missing person, complied with an order of the court under Section 362.011.

SECTION 51. Section 401.001(a), Estates Code, as effective January 1, 2014, is amended to read as follows:
(a) Any person capable of making a will may provide in the person's will that no other action shall be had in the probate court in relation to the settlement of the person's estate than the probating and recording of the will and the return of any required ~~an~~ inventory, appraisalment, and list of claims of the person's estate.

SECTION 51. Same as House version.

SECTION 52. Section 401.004(d), Estates Code, as effective January 1, 2014, is amended to read as follows:
(d) If a trust is created in the decedent's will or if the decedent's will devises property to a trustee as described by Section 254.001, the person or class of persons entitled to receive property outright from the trust on the decedent's death and those first eligible to receive the income from the trust, when determined as if the trust were to be in existence on the date of the decedent's death, shall, for the purposes of Section 401.002, be considered to be the distributee or distributees on behalf of the trust, and any other trust or trusts coming into existence on the termination of the trust, and are

SECTION 52. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

authorized to apply for independent administration on behalf of the trusts without the consent or agreement of the trustee or any other beneficiary of the trust, or the trustee or any beneficiary of any other trust which may come into existence on the termination of the trust. If a trust beneficiary who is considered to be a distributee under this subsection is an incapacitated person, the trustee or cotrustee may file the application or give the consent, provided that the trustee or cotrustee is not the person proposed to serve as the independent executor.

SECTION 53. Section 401.006, Estates Code, as effective January 1, 2014, is amended to read as follows:
Sec. 401.006. GRANTING POWER OF SALE BY AGREEMENT. In a situation in which a decedent does not have a will, or a decedent's will does not contain language authorizing the personal representative to sell ~~[real]~~ property or contains language that is not sufficient to grant the representative that authority, the court may include in an order appointing an independent executor under Section 401.002 or 401.003 any general or specific authority regarding the power of the independent executor to sell ~~[real]~~ property that may be consented to by the beneficiaries who are to receive any interest in the ~~[real]~~ property in the application for independent administration or in their consents to the independent administration. The independent executor, in such event, may sell the ~~[real]~~ property under the authority granted in the court order without the further consent of those beneficiaries.

SECTION 53. Same as House version.

SECTION 54. Section 403.055, Estates Code, as effective January 1, 2014, is amended to read as follows:

SECTION 54. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

Sec. 403.055. CERTAIN UNSECURED CLAIMS; BARRING OF CLAIMS. An unsecured creditor who has a claim for money against an estate and who receives a notice under Section 308.054 shall give to the independent executor notice of the nature and amount of the claim before the 121st ~~[not later than the 120th]~~ day after the date the notice is received or the claim is barred.

SECTION 55. Section 403.056(a), Estates Code, as effective January 1, 2014, is amended to read as follows:

(a) Notice to the independent executor required by Sections 403.052 and 403.055 must be contained in:

- (1) a written instrument that complies with Section 355.004 and is hand-delivered with proof of receipt, or mailed by certified mail, return receipt requested with proof of receipt, to the independent executor or the executor's attorney;
- (2) a pleading filed in a lawsuit with respect to the claim; or
- (3) a written instrument that complies with Section 355.004 or a pleading filed in the court in which the administration of the estate is pending.

SECTION 56. Section 404.001(a), Estates Code, as effective January 1, 2014, is amended to read as follows:

(a) At any time after the expiration of 15 months after the date that the court clerk first issues letters testamentary or of administration to any personal representative of an estate ~~[an independent administration was created and the order appointing an independent executor was entered by the probate court]~~, any person interested in the estate may demand an accounting from the independent executor. The independent executor shall furnish to the person or persons making the demand an exhibit in writing, sworn and

SENATE VERSION (IE)

SECTION 55. Same as House version.

SECTION 56. Same as House version.

CONFERENCE

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

subscribed by the independent executor, setting forth in detail:

- (1) the property belonging to the estate that has come into the executor's possession as executor;
- (2) the disposition that has been made of the property described by Subdivision (1);
- (3) the debts that have been paid;
- (4) the debts and expenses, if any, still owing by the estate;
- (5) the property of the estate, if any, still remaining in the executor's possession;
- (6) other facts as may be necessary to a full and definite understanding of the exact condition of the estate; and
- (7) the facts, if any, that show why the administration should not be closed and the estate distributed.

SECTION 57. Chapter 404, Estates Code, as effective January 1, 2014, is amended by amending Section 404.003 and adding Sections 404.0035, 404.0036, and 404.0037 to read as follows:

Sec. 404.003. REMOVAL OF INDEPENDENT EXECUTOR WITHOUT NOTICE. The probate court, on the court's own motion or on the motion of any interested person, and without notice, may remove an independent executor appointed under this subtitle when:

- (1) the independent executor cannot be served with notice or other processes because:
 - (A) the independent executor's whereabouts are unknown;
 - (B) the independent executor is eluding service; or
 - (C) the independent executor is a nonresident of this state without a designated resident agent; or
- (2) sufficient grounds appear to support a belief that the independent executor has misapplied or embezzled, or is about to misapply or embezzle, all or part of the property

SECTION 57. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

committed to the independent executor's care.
Sec. 404.0035. REMOVAL OF INDEPENDENT EXECUTOR WITH NOTICE. (a) The probate court, on the court's own motion, may remove an independent executor appointed under this subtitle after providing 30 days' written notice of the court's intent to remove the independent executor, by certified mail, return receipt requested, to the independent executor's last known address and to the last known address of the independent executor's attorney of record, if the independent executor:
(1) neglects to qualify in the manner and time required by law; or
(2) fails to return, before the 91st day after the date the independent executor qualifies, either an inventory of the estate property and a list of claims that have come to the independent executor's knowledge or an affidavit in lieu of the inventory, appraisalment, and list of claims, unless that deadline is extended by court order.
(b) The probate court, on its own motion or on motion of any interested person, after the independent executor has been cited by personal service to answer at a time and place fixed in the notice, may remove an independent executor when:
(1) [the independent executor fails to return within 90 days after qualification, unless such time is extended by order of the court, either an inventory of the property of the estate and list of claims that have come to the independent executor's knowledge or an affidavit in lieu of the inventory, appraisalment, and list of claims;
[(2) sufficient grounds appear to support belief that the independent executor has misapplied or embezzled, or that the independent executor is about to misapply or embezzle, all or any part of the property committed to the independent

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

~~executor's care;~~
[~~(3)~~] the independent executor fails to make an accounting which is required by law to be made;
(2) [~~(4)~~] the independent executor fails to timely file the affidavit or certificate required by Section 308.004;
(3) [~~(5)~~] the independent executor is proved to have been guilty of gross misconduct or gross mismanagement in the performance of the independent executor's duties;
(4) [~~(6)~~] the independent executor becomes an incapacitated person, or is sentenced to the penitentiary, or from any other cause becomes legally incapacitated from properly performing the independent executor's fiduciary duties; or
(5) [~~(7)~~] the independent executor becomes incapable of properly performing the independent executor's fiduciary duties due to a material conflict of interest.
Sec. 404.0036. REMOVAL ORDER. (a) [~~(b)~~] The order of removal of an independent executor shall state the cause of removal and shall direct by order the disposition of the assets remaining in the name or under the control of the removed independent executor. The order of removal shall require that letters issued to the removed independent executor shall be surrendered and that all letters shall be canceled of record.
(b) If an independent executor is removed by the court under Section 404.003 or 404.0035 [~~this section~~], the court may, on application, appoint a successor independent executor as provided by Section 404.005.
Sec. 404.0037. COSTS AND EXPENSES RELATED TO REMOVAL OF INDEPENDENT EXECUTOR. (a) [~~(c)~~] An independent executor who defends an action for the independent executor's removal in good faith, whether successful or not, shall be allowed out of the estate the independent executor's necessary expenses and disbursements,

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

including reasonable attorney's fees, in the removal proceedings.

(b) [(d)] Costs and expenses incurred by the party seeking removal that are incident to removal of an independent executor appointed without bond, including reasonable attorney's fees and expenses, may be paid out of the estate.

SECTION 58. Sections 404.005(b) and (c), Estates Code, as effective January 1, 2014, are amended to read as follows:

(b) Except as otherwise provided by this subsection, if [(H)] a distributee described in this section is an incapacitated person, the guardian of the person of the distributee may sign the application on behalf of the distributee. If the probate court finds that either the continuing of independent administration or the appointment of the person, firm, or corporation designated in the application as successor independent executor would not be in the best interest of the incapacitated person, then, notwithstanding Subsection (a), the court may not enter an order continuing independent administration of the estate. If the distributee is an incapacitated person and has no guardian of the person, the court may appoint a guardian ad litem to make application on behalf of the incapacitated person if the probate court considers such an appointment necessary to protect the interest of that distributee. If a distributee described in this section is a minor and has no guardian of the person, a natural guardian of the minor may sign the application for the order continuing independent administration on the minor's behalf unless a conflict of interest exists between the minor and the natural guardian.

(c) Except as otherwise provided by this subsection, if [(H)] a trust is created in the decedent's will or if the decedent's will devises property to a trustee as described by Section 254.001,

SECTION 58. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

the person or class of persons entitled to receive property outright from the trust on the decedent's death and those first eligible to receive the income from the trust, determined as if the trust were to be in existence on the date of the filing of the application for an order continuing independent administration, shall, for the purposes of this section, be considered to be the distributee or distributees on behalf of the trust, and any other trust or trusts coming into existence on the termination of the trust, and are authorized to apply for an order continuing independent administration on behalf of the trust without the consent or agreement of the trustee or any other beneficiary of the trust, or the trustee or any beneficiary of any other trust which may come into existence on the termination of the trust. If a person considered to be a distributee under this subsection is an incapacitated person, the trustee or cotrustee may apply for the order continuing independent administration or sign the application on the incapacitated person's behalf if the trustee or cotrustee is not the person proposed to serve as the independent executor.

SECTION 59. Section 405.001(b), Estates Code, as effective January 1, 2014, is amended to read as follows:
(b) On receipt of the accounting and, after notice to the independent executor and a hearing, unless the court finds a continued necessity for administration of the estate, the court shall order its distribution by the independent executor to the distributees entitled to the property. If the court finds there is a continued necessity for administration of the estate, the court shall order the distribution of any portion of the estate that the court finds should not be subject to further administration by the independent executor. If any portion of the estate that is ordered to be distributed is incapable of distribution without

SECTION 59. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

prior partition or sale, the court may:

(1) ~~[shall]~~ order partition and distribution, or sale, in the manner provided for the partition and distribution of property incapable of division in supervised estates; or

(2) order distribution of that portion of the estate incapable of distribution without prior partition or sale in undivided interests.

SECTION 60. Section 551.001(a), Estates Code, as effective January 1, 2014, is amended to read as follows:

(a) The court, by written order, shall require the executor or administrator of an estate to pay to the comptroller as provided by this subchapter the share of that estate of a person entitled to that share who does not demand the share, including any portion deposited in an account in the court's registry under Section 362.011(c), from the executor or administrator within six months after the date of, as applicable:

(1) a court order approving the report of the commissioners of partition made under Section 360.154; or

(2) the settlement of the final account of the executor or administrator.

SECTION 61. Section 122.057, Estates Code, as effective January 1, 2014, is repealed.

SECTION 62. (a) The changes in law made by Section 111.051, Estates Code, as amended by this Act, and Section 111.054, Estates Code, as added by this Act, represent the fundamental policy of this state for the protection of its residents and are intended to prevail over the laws of another state or jurisdiction, to the extent those laws are in conflict

SECTION 60. Same as House version.

SECTION 61. Same as House version.

SECTION 62. Same as House version.

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

SENATE VERSION (IE)

CONFERENCE

with Texas law.

(b) The changes in law made by Section 111.051, Estates Code, as amended by this Act, and Section 111.054, Estates Code, as added by this Act, apply to an account at a financial institution, an insurance contract, an annuity contract, a retirement account, a beneficiary designation, or another similar arrangement of a person who dies on or after the effective date of this Act.

SECTION 63. (a) Section 21.005(b), Estates Code, as added by this Act, applies only to a will executed on or after the effective date of this Act. A will executed before the effective date of this Act is governed by the law in effect on the date the will was executed, and the former law is continued in effect for that purpose.

(b) The changes in law made by this Act to Sections 204.151 and 204.152, Estates Code, apply only to a proceeding to declare heirship commenced on or after January 1, 2014. A proceeding to declare heirship commenced before that date is governed by the law in effect on the date the proceeding was commenced, and the former law is continued in effect for that purpose.

(c) The changes in law made by this Act to Section 304.001(c), Estates Code, apply only to an application for the grant of letters testamentary or of administration of a decedent's estate filed on or after January 1, 2014. An application for the grant of letters testamentary or of administration of a decedent's estate filed before that date is governed by the law in effect on the date the application was filed, and the former law is continued in effect for that purpose.

(d) The changes in law made by Sections 32.006, 256.052,

SECTION 63. (a) Section 21.005(b), Estates Code, as added by this Act, applies only to a will executed on or after the effective date of this Act. A will executed before the effective date of this Act is governed by the law in effect on the date the will was executed, and the former law is continued in effect for that purpose.

(b) The changes in law made by this Act to Sections 204.151 and 204.152, Estates Code, apply only to a proceeding to declare heirship commenced on or after January 1, 2014. A proceeding to declare heirship commenced before that date is governed by the law in effect on the date the proceeding was commenced, and the former law is continued in effect for that purpose.

(c) The changes in law made by this Act to Section 304.001(c), Estates Code, apply only to an application for the grant of letters testamentary or of administration of a decedent's estate filed on or after January 1, 2014. An application for the grant of letters testamentary or of administration of a decedent's estate filed before that date is governed by the law in effect on the date the application was filed, and the former law is continued in effect for that purpose.

(d) The changes in law made by Sections 32.006, 256.052,

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION

256.053, 256.054, 256.152(c), 256.153, 256.154, 256.155(a), 256.156, 256.203, 257.052, 257.053, 401.001(a), 401.004(d), and 401.006, Estates Code, as amended by this Act, and Section 53.107, Estates Code, as added by this Act, apply only to an action filed or other proceeding commenced on or after the effective date of this Act. An action filed or other proceeding commenced before the effective date of this Act is governed by the law in effect on the date the action was filed or the proceeding was commenced, and the former law is continued in effect for that purpose.

(e) The changes in law made by Sections 51.203(c), 53.104, 305.002(a), 305.003, 308.054(b), 309.051(a), 309.056, 309.103(a) and (b), 355.060, 361.155(b), 362.005, 362.011, 362.013, 404.001(a), 404.003, 404.005(b) and (c), 405.001(b), and 551.001(a), Estates Code, as amended by this Act, and Sections 253.001(c), 301.155, 305.004, 309.057, 361.155(c), 404.0035, 404.0036, and 404.0037, Estates Code, as added by this Act, apply to the administration of the estate of a decedent that is pending or commenced on or after the effective date of this Act.

(f) The changes in law made by Sections 102.004, 201.001(f) and (g), 201.051, 201.052(b), 202.004, 202.009, 202.056, 202.151, 353.101(d), 403.055, and 403.056(a), Estates Code, as amended by this Act, and Sections 201.001(i) and (j), 201.052(a-1), 202.0025, and 202.057, Estates Code, as added by this Act, apply only to the estate of a decedent who dies on or after the effective date of this Act. The estate of a decedent who dies before the effective date of this Act is governed by the law in effect on the date of the decedent's death, and the former law is continued in effect for that purpose.

(g) Section 202.0025, Estates Code, as added by this Act, is intended to clarify current law in regard to the commencement

SENATE VERSION (IE)

256.053, 256.054, 256.152(c), 256.153, 256.154, 256.155(a), 256.156, 256.203, 257.052, 257.053, 401.001(a), 401.004(d), and 401.006, Estates Code, as amended by this Act, and Section 53.107, Estates Code, as added by this Act, apply only to an action filed or other proceeding commenced on or after the effective date of this Act. An action filed or other proceeding commenced before the effective date of this Act is governed by the law in effect on the date the action was filed or the proceeding was commenced, and the former law is continued in effect for that purpose.

(e) The changes in law made by Sections 51.203(c), 53.104, 305.002(a), 305.003, 308.054(b), 309.051(a), 309.056, 309.103(a) and (b), 355.060, 361.155(b), 362.005, 362.011, 362.013, 404.001(a), 404.003, 404.005(b) and (c), and 551.001(a), Estates Code, as amended by this Act, and Sections 253.001(c), 301.155, 305.004, 309.057, 361.155(c), 404.0035, 404.0036, and 404.0037, Estates Code, as added by this Act, apply to the administration of the estate of a decedent that is pending or commenced on or after the effective date of this Act. [CA1(2)]

(f) The changes in law made by Sections 102.004, 201.051, 201.052(b), 202.004, 202.009, 202.056, 202.151, 353.101(d), 403.055, 403.056(a), and 405.001(b), Estates Code, as amended by this Act, and Sections 201.052(a-1), 202.0025, and 202.057, Estates Code, as added by this Act, apply only to the estate of a decedent who dies on or after the effective date of this Act. The estate of a decedent who dies before the effective date of this Act is governed by the law in effect on the date of the decedent's death, and the former law is continued in effect for that purpose. [CA1(3);CA2(2)-(3)]

(g) Section 202.0025, Estates Code, as added by this Act, is intended to clarify current law in regard to the commencement

CONFERENCE

House Bill 2912
Senate Amendments
Section-by-Section Analysis

HOUSE VERSION	SENATE VERSION (IE)	CONFERENCE
<p>of proceedings to declare heirship, and an inference may not be made regarding the statute of limitations for a proceeding to declare heirship filed before the effective date of this Act.</p> <p>(h) An inference may not be made from the changes in law made by this Act to Section 401.006, Estates Code, as to whether an independent executor had the authority to sell personal property of the estate in a probate proceeding filed before the effective date of this Act.</p> <p>SECTION 64. To the extent of any conflict, this Act prevails over another Act of the 83rd Legislature, Regular Session, 2013, relating to nonsubstantive additions to and corrections in enacted codes.</p> <p>SECTION 65. This Act takes effect January 1, 2014.</p>	<p>of proceedings to declare heirship, and an inference may not be made regarding the statute of limitations for a proceeding to declare heirship filed before the effective date of this Act.</p> <p>(h) An inference may not be made from the changes in law made by this Act to Section 401.006, Estates Code, as to whether an independent executor had the authority to sell personal property of the estate in a probate proceeding filed before the effective date of this Act.</p> <p>SECTION 64. Same as House version.</p> <p>SECTION 65. Same as House version.</p>	