



QUESTIONNAIRE

TO PREPARE FOR THE ATTESTING OF AN APPLICATION FOR A CERTIFICATE OF INHERITANCE OR A EUROPEAN CERTIFICATE OF SUCCESSION (ECS)

Please type or complete in block capitals.

I.

Your replies to this questionnaire simplify the process of applying for a certificate of inheritance or an ECS. The facts required to substantiate the application for the issuance of the certificate of inheritance or ECS must be supported by evidence or an affirmation in lieu of an oath. Knowingly or negligently giving false information in such an affirmation is a punishable offence. In compensation proceedings, a false affirmation may invalidate all claims to compensation.

Please bring with you a valid identification document with photograph.

You should submit the following documents with the application, if they are available:

1. Originals or photocopies (if possible, authenticated) of all wills by the deceased; testamentary dispositions containing a choice of inheritance law to be applied; insofar as judicial proceedings are or have been pending, the documents relating thereto (e.g. probate). If inheritance has already been proven to the satisfaction of a foreign probate authority, please submit the documents obtained
2. The deceased's death certificate
3. If the deceased's spouse, descendants or other relatives are the heirs, their relationship with the deceased must be proven. Documents admitted as proof are:
 - a) marriage certificate;
 - b) birth certificate or certificate of parentage; or corresponding authenticated transcripts or extracts from the family book;
 - c) if the deceased's spouse or the relatives entitled to inherit died before the deceased, their death certificates must be submitted;
 - d) if a renunciation of inheritance had been agreed with the deceased by heirs having an entitlement equal or higher-ranking to that of the applicant, this agreement must be submitted or the place where it is deposited specified;
 - e) if an advance inheritance payment has been made (permitted under sections 1934 (d) and (e) of the German Civil Code (old version) until 1 April 1998), an authenticated transcript or copy of the advance inheritance payment agreement must be submitted;
 - f) if an agreement had been made between a father and his children born out of wedlock prior to 1 July 1949 pursuant to Article 12 (10) (a) of the Act on the Legal Status of Children born out of Wedlock, an authenticated transcript or copy of the agreement must be submitted;

- g) if an heir has disclaimed the inheritance, it is sufficient to refer to the probate records.

If available, please also submit letters from lawyers, notaries public, German and foreign authorities; as the case may be, copies will suffice.

It is in the applicant's interest to submit to the consular officer all available documents concerning his/her right of inheritance, for this enables the latter to carry out his/her duties as efficiently as possible. Gaps in the documentation are to the detriment of the applicant and may subsequently lead to the dismissal of the application for a certificate of inheritance or an ECS by the probate court, which requires all evidence to be submitted.

II.

1. Information about the applicant:

- a) Surname (and name at birth, if applicable; if divorced or widowed, list surname(s) previously used):
- b) Forename(s):
- c) Date, place and country of birth:
- d) Occupation:
- e) Language:
- f) Nationality:
- g) Address and telephone no.:
- h) Identification document (for German nationals, preferably German passport):
 - No.
 - Register no.
 - Issued on
 - Issuing authority
- i) Relationship to the deceased:
- j) Purpose for which the certificate of inheritance/ECS is required:

2. Information about the deceased:

- (a) Surname (and name at birth, if applicable):
- b) Forename(s):
- c) Date, place and country of birth:
- d) Address at the time of death: (if the deceased had more than one address, please provide the most relevant):
- e) When and where did the deceased die (death certificate):
- f) Place of habitual abode at the time of death:
(The place of habitual abode of a deceased person must be determined by the authorities by means of a general assessment of the deceased's circumstances in the years prior to death and at the time of death. This assessment will take particular account of the duration and regularity of the deceased's stays in the relevant country, but also of the circumstances surrounding and reasons for it. These should show evidence of a particularly close and strong link with the relevant state.)

Administrative area in which the deceased was domiciled (administrative district, province, etc., federal state):

Last domicile in the country of which the deceased was a national:

- g) Where are the deceased's assets for which a formal certificate of inheritance is required?

h) If missing:

If a final declaration of death has been made, state the time of death established by the court, as well as the date and reference number of the German local court's decision:

If no final declaration of death has been made, state since when the deceased has been missing, last known domicile, and any additional information to support the presumption of death:

i) Nationality at the time of death:

(The term "German nationality" also applies to persons who, pursuant to Article 116 (1) of the Basic Law of the Federal Republic of Germany, have legal status as Germans without possessing German nationality.)

Nationality proven by:

Certificate of nationality,
Certificate indicating legal status as a German national.

If German by naturalisation or – for women – by marriage to a German (prior to 31 March 1953) or by declaration following marriage to a German (prior to 31 December 1969), state previous nationality as well:

Did the deceased additionally possess any nationality/nationalities other than German at the time of death?

If the deceased was denaturalised pursuant to the Act of 14 July 1933 (Reich Law Gazette I p. 480) or the ordinance of 25 November 1941 (Reich Law Gazette I p. 722) and not renaturalised and did not acquire a foreign nationality, enter "stateless."

If stateless:

Nationality acquired at birth:

Date of and reason for emigration:

j) Marital status at time of death (single, married, widowed, divorced):

Date of marriage

First marriage:

Second marriage:

Place of marriage and first common domicile:

First marriage:

Second marriage:

k) Nationality at the time of marriage:

First marriage:

Second marriage:

l) Did the deceased live in Germany at any time? If so, when and where?

m) Was the deceased legally a member or non-member of a church, religious community or philosophical community at the time of death (only applicable if the deceased's last country of residence subjects inheritances to religious law)?

3. Spouse of the deceased:

First marriage:

- a) Surname (and name at birth, if applicable):
- b) Forename(s):
- c) Address:
- d) Date and place of birth:
- e) Nationality at the time of marriage:
- f) Date and place of death or divorce (for divorce, state the court which pronounced the final decree and the date and reference number of the judgement):

Second marriage:

- a) Surname (and name at birth, if applicable):
- b) Forename(s):
- c) Address:
- d) Date and place of birth:
- e) Nationality at the time of marriage:
- f) Date and place of death or divorce (for divorce, state the court which pronounced the final decree and the date and reference number of the judgement):

4.

- (a) Was a marriage contract (regulating property rights) concluded before a court or notary public?:

If yes, where, when and under what law was it concluded? What provisions does it contain?

Type of property regime agreed on:

- b) Did the deceased or the deceased's spouse make a unilateral declaration before a German notary public, a German court or German mission abroad precluding the statutory property regime of a community of accrued gains under the German Civil Code?

If yes, state type and date of declaration and to whom it was made:

5. Descendants of the deceased (children including from previous marriages, adopted children and children born out of wedlock):

For adopted children, state the date and place of the adoption and the authority responsible.

In the case of children born out of wedlock, state whether paternity has been acknowledged or determined by a final court judgement or whether proceedings to determine paternity are or pending, were, or whether and when an application to determine paternity will be made.

- a) Surname (and name at birth, if applicable):
Forename(s):
Date and place of birth:
Address:
Marital status (single, married, widowed, divorced):
Place and date of death:

- b) Surname (and name at birth, if applicable):
Forename(s):
Date and place of birth:
Address:

Marital status (single, married, widowed, divorced):
Place and date of death:

- c) Surname (and name at birth, if applicable):
Forename(s):
Date and place of birth:
Address:
Marital status (single, married, widowed, divorced):
Place and date of death:

For further descendants, please enter details overleaf.

If any of the descendants listed above died before the deceased or disclaimed the inheritance, enter the details (surname, first name(s), date and place of birth and address) of their children by the relevant letters below.

Children of 5 a)

Children of 5 b)

Children of 5 c)

For further children, please enter details overleaf.

6. If the deceased has no descendants:

Parents of the deceased (if adoptive parents, please underline the word “adoptive” and also give details of the natural parents):

- a) Father:
Surname (and name at birth, if applicable):
Forename(s):
Date and place of birth:
Address:
Place and date of death:

- b) Mother:
Surname (and name at birth, if applicable):
Forename(s):
Date and place of birth:
Address:
Place and date of death:

7. If one or both of the parents are deceased:

Siblings of the deceased:

- a) Surname (and name at birth, if applicable):
Forename(s):
Date and place of birth:
Address:
Place and date of death:

b) Surname (and name at birth, if applicable):

Forename(s):

Date and place of birth:

Address:

Place and date of death:

c) Surname (and name at birth, if applicable):

Forename(s):

Date and place of birth:

Address:

Place and date of death:

For further siblings, please enter details overleaf.

Please list below under the relevant letters the children of those siblings who died before the deceased:

Children of 7 a)

Children of 7 b)

Children of 7 c)

8. If the deceased has neither descendants (section 5) nor heirs pursuant to section 6 or 7, name his paternal and maternal grandparents and their descendants (siblings of the deceased's parents and the children of these siblings):

If dead, state date and place of death.

9. If no living persons are named in sections 3 and 5 – 8, which persons related to the deceased are still alive?

10. Are or were there any other persons, due to whom the named heir(s) could be excluded from the inheritance or could have their portion of the inheritance reduced?

11. Did the deceased make a disposition mortis causa (testamentary disposition) in the form of a will, joint will or deed of succession?

Date and place of execution:

Type of testamentary disposition:

12. Did the deceased make any other disposition mortis causa (testamentary disposition), e.g. a will, joint will, deed of succession?

Date and place of execution:

Type of testamentary disposition:

1) Private:

a) handwritten (wholly in the deceased's own hand)

b) typewritten before witnesses (how many?)

(only in countries where Anglo-American law applies)

2) Public will?

Before whom was it executed (e.g. notary public)?

A notary public in countries where Anglo-American law applies has no power equivalent to that under German law to authenticate documents; if he is mentioned in a will governed by Anglo-American law, the will is not deemed to be a public one.

(3) Special types of testamentary disposition envisaged under specific legal systems for certain situations (e.g. in case of deadly peril, etc.):

Court or other agency to which the testamentary disposition was submitted, stating reference number and date:

Where is the document now?

Has executorship of the estate been stipulated?

Name and address of the executor:

Has administration of the estate been stipulated?

Name and address of the administrator:

Does the will provide for provisional succession or estate in remainder?

Do further dispositions mortis causa exist? If so, give details:

Who are the heirs appointed by the deceased in such dispositions mortis causa (surnames, forenames, dates and places of birth, addresses)?

13. To which portions of the inheritance are the heirs appointed by a disposition mortis causa or statutory heirs entitled?

14. Miscellaneous:

a) Does the deceased's estate include land in Germany? If so, where is it located (please give the most precise information possible, including the specifications contained in the cadaster or land register, if known)? Is a certificate of inheritance/ECS needed for this purpose?

b) Does the estate include property in Germany other than land? If so, where is it located? Is a certificate of inheritance/ECS needed for this purpose?:

c) Is a lawsuit concerning the right of succession pending?

d) If yes, before which court?:

Reference no.:

Date:

e) Has a certificate of inheritance/ECS already been issued for the whole estate or a part thereof or has a final court judgement been handed down?

f) If yes, by which court?

Reference no.:

Date:

g) What is the estimated market value of

a) the entire estate, excluding any debts?

b) the part of the estate located in the Federal Republic of Germany?

h) Is the certificate of inheritance needed for reparation, restitution or equalisation-of-burden proceedings? (underline as appropriate)

Authority responsible for indemnification/equalisation of burdens:

Reference no.:

i) Do you have a local authorised representative?

Name:
Address:
Telephone no.:

Do you have a representative in the Federal Republic of Germany authorised to deal with further inheritance proceedings?

Name:
Address:
Telephone no.:
What power of attorney have you granted?

If you have no authorised representative in the Federal Republic of Germany, are you willing to authorise a person to represent you in further inheritance proceedings?

Name:
Address:
Telephone no.:

j) To which other persons should the probate court send the certificate of inheritance/certified copy of the ECS?

Name:
Address:

k) When were you informed of your inheritance and of the reasons for your entitlement as heir (will, deed of succession or statutory succession)?

Have you accepted the inheritance? (if not disclaimed, it is deemed accepted)

l) Have your co-heirs been informed of the inheritance?
Have they accepted the inheritance? (if not disclaimed, it is deemed accepted)

m) Are you applying for a joint certificate of inheritance for all heirs or only for a certificate for your portion of the estate?

n) Are you applying for a European Certificate of Succession (ECS)?

o) I enclose the following certificates and documents (see section I above – pages 1 – 2):

p) I shall submit the following certificates and documents (see section I above) to the probate court in due course:

q) I am unable to obtain the following certificates (please give reasons):

r) The application proceedings for a certificate of inheritance/ECS should if possible be conducted in German. Do you have an adequate command of German for this?

14.

a) I request that a date be fixed for the attesting of the application proceedings for the certificate of inheritance/ECS.

Suggested dates:

b) I am unable to appear in person because of the distance involved. Please assist me in drawing up a written application.

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(Signature of applicant or local authorised representative)