

RK 520.50/

(will be amended by Embassy / Consulate General)

QUESTIONNAIRE FOR THE APPLICATION FOR AN INHERITANCE CERTIFICATE

1. THE DECEASED

Surname _____ first and middle names (if applicable) _____

_____ name at birth _____

date of birth _____ place (town, country) _____

date of death _____ place (town, country) _____

last residence (town, country) _____

last place of residence in Germany, even as a child (town) _____

citizenships at the time of death (state all that apply) _____

() German () US-American () other _____

(if more than one): Which one was more important for the deceased? _____

marital status at the time of death: _____ (e.g. single, married, widow(er))

Please submit a valid ID for yourself, as well as the following supporting documents (in copy) of the deceased and the heirs (if available):

Death certificate Birth certificate Marriage certificate Copy of the passport(s)

Last will Naturalization certificate(s) Certificate of change of name

2. THE APPLICANT (one of the heirs)

Surname _____ first name(s) _____

name at birth _____

date of birth _____ place (town, country) _____

address (street, town, country) _____

telephone _____

citizenships: () German () US-American () other _____

Valid Passport/Driver's license No.: _____ Email address _____

I speak the following languages: () German () English

The deceased was my _____ (e.g. husband, wife, father, mother, uncle, sister).

Date: _____ **Signature:** _____

3. MARRIAGES (please mark the correct answer)

- The deceased was **single**.
- The deceased was **married only once**.
- The deceased was a **widow/widower**.
- The deceased was **married _____ times** (indicate number of marriages).

(in case of several marriages: please copy this page and give details for every marriage)

The _____ (e.g. first, second ...) marriage with:

Surname _____ first name(s) _____

name at birth _____

date of birth _____ place (town, country) _____

last address (street, place, country) _____

took place on _____ in (town, country) _____

The couple first common residence after the marriage was in _____

The first spouse of the deceased died on the _____ in _____

The marriage was divorced by the decree of the _____-court
in (town, country) _____ on the _____

Citizenship(s) of the **deceased** at the time of the first marriage (please state **all**):

- German US-American other

Citizenship of the **spouse** at the time of the first marriage (please state **all**):

- German US-American other

Did the deceased enter into a special agreement on his marital property regime?

- no yes

Type _____

(e.g. marriage contract, declaration on matrimonial property)

Please enclose a copy of this document

4. CHILDREN OF THE DECEASED (please mark the correct answer)

The deceased did have natural children/descendants no yes

(details below)

Were any children adopted? no yes (provide details below)

Were there any children born out of wedlock? no yes (provide details below)

The deceased had the following children:

1. child from the _____ (e.g. first. second ...) marriage (give the number)

Surname _____ first name(s) _____

name at birth _____

date of birth _____ place (town, country) _____

date of death _____ place (town, country) _____

address (street, town, country) _____

2. child from the _____ (e.g. first. second ...) marriage (give the number)

Surname _____ first name(s) _____

name at birth _____

date of birth _____ place (town, country) _____

date of death _____ place (town, country) _____

address (street, town, country) _____

3. child from the _____ (e.g. first. second ...) marriage (give the number)

Surname _____ first name(s) _____

name at birth _____

date of birth _____ place (town, country) _____

date of death _____ place (town, country) _____

address (street, town, country) _____

If there are more children please continue accordingly on a separate page.

5. PARENTS OF THE DECEASED

(only fill in this page, if the deceased had no children and there is no will)

Father of the deceased:

Surname _____ first name(s) _____

date of birth _____ place (town, country) _____

date of death _____ place (town, country) _____

(last) residence (street, town, country) _____

Mother of the deceased:

Surname _____ first name(s) _____

maiden name _____

date of birth _____ place (town, country) _____

date of death _____ place (town, country) _____

(last) residence (street, town, country) _____

(Only fill in the next section if one parent died before the deceased, please mark the correct answer)

- The parents of the deceased had no children except the deceased.
- In addition to the deceased the parents had the following children. **(give details according to No.4 on a separate page)**

Did the parents adopt any children? no yes **(give details according to No.4 on a separate page)**

Did the parents have children born out of wedlock? no yes **(give details according to No.4 on a separate page)**

- The parents had no children. One parent survived the deceased.
- the parents had no children. The parents died before the deceased and had no other children. **(In this case, please copy this page and state particulars for the grandparents and their descendants in section 5)**

6. TESTAMENTARY DISPOSITION (please mark the correct answer)

Is there any last will/contract of Inheritance or Trust?

() no (**continue with number 4**) () yes

If yes - how many? **(if there is more than one; please copy this page and give these details for every will) Please submit copies of the last will(s) and Trust documents.**

Trusts must be summarized or completely translated into German.

Last will dated _____ probated by the court in _____

on _____ with the file number _____

Date of the Letters Testamentary issued by US Court of Probate _____

(Please submit copy)

I. () In the will I am appointed as the only heir.

II. Apart from me the following heirs were appointed:

1. Surname _____ first name(s) _____

name at birth _____

date of birth _____ place (town, country) _____

date of death _____ place (town, country) _____

address (street, town, country) _____

family relation to the deceased _____

2. Surname _____ first name(s) _____

name at birth _____

date of birth _____ place (town, country) _____

date of death _____ place (town, country) _____

address (street, town, country) _____

family relation to the deceased _____

If there are more heirs appointed, please continue accordingly on a separate page

7. OTHER (please mark the correct answer)

My co-heirs agree to my applying for a common certificate of inheritance also

on their behalf no yes

Are all the heirs willing to accept the inheritance no yes

Is a lawsuit pending in this matter about the right to inherit? no yes

The value of the estate in Germany at the time of the death of the previous owner is approximately _____ € (very important), please provide proof for this figure

To whom shall the court send the inheritance certificate?

Does the inheritance include **land** in Germany? no yes

where? (town, street) _____

description in the land register _____

Does the inheritance include a **bank account**? no yes

name of bank, place _____

account number _____

Does the inheritance include a **registered Company**? no yes

name of Company _____

trade register in _____

Do you need the certificate of inheritance for **restitution or pension matters**? no yes

If yes: name of the authority _____

file number of that authority _____

Does the inheritance include estate in another **EU country**? no yes

If yes, which countries? _____ What does the estate consist of? _____

If applicable: My **authorized representative** in this matter is _____

address (street, town, country) _____

Additional Information:

A certificate of inheritance enables the heirs to prove their status as legal successors of the deceased.

In general, a certificate of inheritance is needed in the following cases:

- **Real estate** (i.e. apartments, estates, houses) located in Germany was inherited and the change of ownership from the deceased to the heir(s) needs to be registered with the competent German land titles office.
- The deceased received a **pension or compensation payments** from a German authority which will only release amounts due if the heirs prove their right of inheritance.
- The deceased was the (co-)owner or heir of **real estate** located in former East Germany, confiscated by the national socialist regime and the German authority processing the **restitution or compensation claim** asks for an inheritance certificate.
- The deceased had **assets in a German bank**

Certificates of inheritance can only be issued by a German court if the deceased person was a German Citizen or the deceased person, regardless of his/her nationality, left estate located in Germany.

In the application for a certificate of inheritance the heir must render a declaration in lieu of an oath. If there are several heirs, it is mostly sufficient that one heir alone, representing the co-heirs, renders this declaration. Outside of Germany declarations in lieu of an oath can only be notarized by an authorized consular official at a German Consulate General or the German Embassy.

All Notarizations require a personal appointment and are not possible on a walk-in basis during regular opening hours.

To allow the preparation of your application, please proceed as follows:

- Please fill in the inheritance questionnaire including all requested details
- Please submit the supporting documents in copy (Originals are not needed at this stage) by email, fax or regular mail to your nearest Consulate General or the Embassy. To find out the competent German mission for you, please check regional competences on our Homepage www.germany.info

Further documents might have to be submitted depending on each individual case. You will be informed about such requirements, if necessary.

Fees: There are individual fees for notarizations according to the value of the estate located in Germany at the time the previous owner deceased. Therefore it is indispensable, that you indicate the value of the inheritance, otherwise we could not proceed with your application. Inaccurate Information on the value of an inheritance will result in a fee reappraisal.

The finalized notarized application will have to be sent to the competent German probate court either by you or by your representative. All supporting documents must at that point be included in their original form or as certified copies.

The German inheritance court may request documents which are not in German to be accompanied by a certified translation into German (translations cannot be provided by the Consulate General or the Embassy) and an apostil. The German court will, if possible, issue the certificate of inheritance and forward it to the person or authority named in the application.

The German Mission can only help you in preparing your application and notarizing it. You or your representative will need to submit it to the German inheritance court and also handle any follow-up correspondence.