

**RK 520.50/**

(Please always state this file number)

**QUESTIONNAIRE FOR THE APPLICATION FOR AN INHERITANCE CERTIFICATE**

**1. THE DECEASED**

Surname \_\_\_\_\_ first name(s) \_\_\_\_\_

name at birth \_\_\_\_\_

date of birth \_\_\_\_\_ place (town, country) \_\_\_\_\_

date of death \_\_\_\_\_ place (town, country) \_\_\_\_\_

last residence (town, country) \_\_\_\_\_

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/Drivers's license No.: \_\_\_\_\_

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

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

**Date:** \_\_\_\_\_ **Signature:** \_\_\_\_\_

**3. TESTAMENTARY DISPOSITIONS**

(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 \_\_\_\_\_

3. 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

#### **4. 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 couples 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.**

### **5. 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 (details below)

Were there any children born out of wedlock?  no  yes (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.****6. 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)

 One parent survived the deceased.

( ) 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)

### **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 inheritance in Germany is approximately \_\_\_\_\_ €**  
(very important)

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 \_\_\_\_\_

If applicable: My **authorized representative** in this matter is \_\_\_\_\_

address (street, town) \_\_\_\_\_

#### **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.
- In other cases, where the inheritance consists of **assets in a German bank**, a certified copy of the last will of the deceased might be sufficient, instead of a certificate of inheritance. This should be clarified with the bank directly.

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 inheritance 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)  
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 inheritance. 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 inheritance 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 apostille.

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.**