

Instructions for Beneficiaries

After Filing Toolkit Forms, Give This to Your Loved Ones

This paper tells your loved ones who will get your home, car, or bank account(s) after your death. It's also a good idea to give each beneficiary (the person who is getting the home, car or money from the bank account) a copy of the forms that have been filed along with any other information they need to know to complete the transactions after your death (example: the affidavit of death form needed to transfer title to your home, the vehicle identification number/VIN for your car, the name of your bank and the branch location where the form was filed, account numbers, etc.).

For My Beneficiaries

I have filed the following forms to make sure that these assets transfer to my beneficiaries after my death.

Check all that apply.

Transfer on Death Deed

Transfers title to a home or other real property to a beneficiary

My beneficiary is

Beneficiary Designation for a Motor Vehicle

Transfers title to a car to a beneficiary

My beneficiary is

Payable on Death Account

Transfers money in a bank account to a beneficiary

My beneficiary is

Beneficiaries: What to Do Following the Death of Your Loved One

If you are the beneficiary on a Transfer on Death Deed (for a home):

To claim the home or property, you must fill out an Affidavit of Death, sign and date the Affidavit of Death in front of a notary and submit it to the county clerk where the property is located. If the property is not fully paid for, you will be responsible for making the mortgage payment and any other expenses associated with the property. The Affidavit of Death form can be found here: texasatj.org/texas-transfer-toolkit.

If you are the beneficiary of a car or other motor vehicle:

To claim title to the car or vehicle, you must get the title changed to your name within 180 days after the owner's death. You can do this by submitting an Application for Texas Title and/or Registration, the title application fee and the Texas title in the deceased owner's name, listing you as beneficiary, to the county clerk where the property is located. It is best to go there in person. If the car is not fully paid for, you will be responsible for making the car payments or the lender can repossess the car. The Application for Texas Title and/or Registration can be found here: texasatj.org/texas-transfer-toolkit.

How to file to receive funds from a Payable on Death Account (for a bank account):

Upon the owner's death, the money in their bank account will go directly to you. Visit the bank where the form was filed to make arrangements for the transfer. Different banks may have different requirements for identification, etc., so it's best to call before you go to be sure you have the right documentation. If you do not live in the same city or town of the bank where the form was filed, call the bank and ask them what to do. They should have the account listed as a payable on death account in their system.