

**Denton County Bar Association – REPTL SECTION**  
**Recommendations for Revisions to**  
**AMENDED LOCAL RULES FOR THE PROBATE COURT OF DENTON COUNTY, TEXAS**

**CHAPTER 1: GENERAL RULES**

**Rule 1.1: Title, Scope, Authority and Application of Local Rules**

- (a) These rules are the Local Rules of the Probate Court of Denton County, Texas. They shall govern proceedings in the Probate Court of Denton County, Texas, for the purpose of securing uniformity and fairness in those proceedings and in order to promote justice.
- (b) These rules are adopted by the Statutory Probate Judge of Denton County, Texas pursuant to §25.0022(d) of the Texas Government Code.
- (c) These rules are standing orders of the Denton County Probate Court, and any other statutory probate court that may be created hereafter in this county. Knowing or intentional violation of these rules may be punished by contempt or other sanction authorized by law or by rules of procedure as the trial judge may deem appropriate.
- (d) Upon final adoption of these Rules, they shall supersede in their entirety, and substitute for, all prior versions of the Local Rules of the Statutory Probate Court of Denton County, Texas.
- (e) All references to the Texas Probate Code and other Codes shall be inclusive of subsequent enactments and revisions thereto.
- (f) Supplemental information, including court procedure manuals, forms and other information is available from the court and on the court's website,
- (g) Additional materials are available to members of the Denton County Bar Association through the Real Estate Probate and Trust Law Section.

**Rule 1.2: Jurisdiction**

The Probate Court of Denton County, Texas hears:

- (a) All applications, petitions and motions regarding probate or guardianship matters;
- (b) All matters incident or appertaining to such guardianships or estates;
- (c) All matters regarding mental health commitments;
- (d) Concurrently with the district court, all actions by or against a person in the person's capacity as a personal representative, in all actions involving an inter vivos trust, in all actions involving a charitable trust, and in all actions involving a testamentary trust, as well as cases involving remedies of constructive trusts and/or resulting trusts; and
- (e) All matters to which jurisdiction is conferred in accordance with the Texas Government Code, Section 25.0635.

**Rule 1.3: Parties and Parties Proceeding Pro Se**

- (a) "Counsel" as used in these Rules includes attorneys and parties representing themselves pro se.

- (b) Consistent with requirements of applicable law, including statutes prohibiting the unauthorized practice of law, the Denton County Probate Court restricts pro se parties from representing themselves or others in certain instances. Representation by legal counsel is required in the following situations:
- i. Named executors, administrators or persons applying as such;
  - ii. Individuals applying for guardianships of persons, estates or both;
  - iii. Representation of third parties, including beneficiaries, heirs or creditors or the estate of another person;

Individuals may present documents to the Clerk of the court for filing, but the court will take no action on the documents unless there is an attorney of record in the case.

- (c) Individuals may represent themselves if they are:
- i. The sole beneficiary in a Muniment of Title action;
  - ii. A non-corporate creditor of a probate or guardianship estate;
  - iii. A non-corporate party in an ancillary civil action; or
  - iv. At the discretion of the Judge.

(d) Discharge of Attorney of Record in Case

In any open case in which counsel is required by these rules, clients are urged to secure substitute counsel as soon as possible or simultaneously with discharging the attorney of record to avoid delays and additional expense.

- (e) Any natural person proceeding on their own behalf without an attorney shall be expected to read and follow these Local Rules and the Rules of Civil Procedure, the Rules of Civil Evidence, the Texas Probate Code, and the Rules of Appellate Procedure as may be appropriate in the particular case. Failure to comply may be sanctioned, fined or punished as in other cases. Pro se parties shall be responsible for providing the Clerk with current addresses and phone numbers. The address so provided shall be used as the address for serving all pleadings and any other notices on the pro se party.

Rule 1.4: Assignment of Causes

- (a) All matters filed in the Probate Court of Denton County, Texas, shall be assigned a number. Once a case number has been assigned and docketed, all matters relating thereto, including but not limited to, any subsequent proceedings upon a testamentary trust or bills of review, shall remain in that court using the same cause number.
- (b) If a case includes an ancillary matter as that term is defined herein, the cause number of all pleadings relating to the ancillary matter shall be followed by the letter "A" or the number "01", whichever is applicable. If a case contains more than one ancillary matter then each subsequent matter shall be designated by sequential letters or numbers. (i.e. B, C, 02, 03, etc.) The style on all ancillary matters shall include the names of the party bringing the action and the opposing party, as well as the name of the estate. A form of the style is set forth in Appendix A.

- (c) “Ancillary matters” shall include any lawsuit brought by or against a personal representative, or brought on behalf of an estate, and which lawsuit does not relate to or concern the routine administration of an estate. Ancillary matters include, but are not limited to, suits concerning note collection, personal injury, breach of contract, and trust litigation. “Contested matters” shall include all other litigated matters, for which there are opposing parties.

#### Rule 1.5: Transfer

It is the responsibility of the counsel representing a party seeking a transfer pursuant to the Texas Probate Code to submit a proper motion and order for the transfer of any causes of action filed in any district, county or statutory county court to the probate court for further proceedings. A hearing shall be scheduled, unless the motion to transfer is agreed upon by all parties. An agreed motion is not binding on the court.

#### Rule 1.6: Severance

- (a) Motions to sever will be granted only upon a showing that a severance is necessary to protect substantial rights or to facilitate disposition of the litigation. Except on a showing of good cause, a severance will not be granted for the purpose of making a judgment final which otherwise would be interlocutory because of the continued pendency of other claims in the case.
- (b) Whenever a motion to sever is sustained, the severed claim shall be filed as a new case in the same court and shall be given a new number or letter by the Probate Clerk. Before the severed claim is filed as a new cause, the clerk’s requirement concerning deposit for costs shall be met.

#### Rule 1.7: Vacations of Counsel

Counsel shall not request a trial date for any period which counsel has previously been informed by other counsel is a scheduled vacation. If a case is set for trial by the court on a date for which a counsel has planned a vacation, counsel will notify the court as soon as the notice of trial setting is received and the case will be reset for a different time, unless there is a clear showing of abuse or unreasonable delay. If plans for a vacation are made by counsel after a trial setting notice has been received, counsel will immediately notify the court and other parties with a request that the case be reset for a different time. The court will rule on such request after giving all parties to the lawsuit an opportunity to respond to the request.

#### Rule 1.8: Judicial Absences

Whenever a judge anticipates an absence day due to vacation, illness, national service, attendance at legal education courses, attendance at the meetings of judicial or bar committees, or otherwise, then that judge may, at his or her discretion, request that the Presiding Judge assign a visiting judge to his or her court, or utilize the Associate Judge pursuant to standing orders or specific referrals or may utilize both the Associate Judge and a visiting judge if necessary. Counsel are encouraged to contact the court administrator to verify whether a visiting judge is scheduled, particularly in the case of continued or contested hearings.

#### Rule 1.9: Bankruptcy

- (a) Notice of Filing
  - (1) Whenever any party to litigation in these courts files for protection under the bankruptcy laws of the United States, it shall be the responsibility of that party’s counsel in these courts:

- (i) To promptly notify the affected court(s) by immediately telephoning the court; and
  - (ii) Within three days of any bankruptcy filing, to provide written notice to the affected court(s) and all counsel that a bankruptcy filing has occurred, giving the name and location of the bankruptcy court, the bankruptcy cause number and style, the date of filing and the name and address of counsel for the debtor(s).
- (2) Compliance with this rule will enable the courts to pass over cases affected by bankruptcy and to try other cases on the docket.
  - (3) Failure to comply with this rule may be punished by sanctioning counsel and, in appropriate cases, the party once the bankruptcy is concluded.
- (b) Conclusion of Bankruptcy

Once a bankruptcy has been concluded, whether by discharge, denial of discharge, an Order lifting the automatic stay so as to permit continuation of the litigation, a dismissal or otherwise, counsel shall promptly notify the court so that the affected cases may be restored to the active docket or be dismissed as may be appropriate.

Rule 1.10: Appointment of Attorney or Guardian Ad Litem

- (a) An attorney or guardian ad litem may be or shall be appointed pursuant to the Probate Code or the Rules of Civil Procedure.
- (b) Until discharged, the ad litem shall be notified of all hearings and/or conferences with the court, and shall be served with all pleadings.
- (c) Except as otherwise directed by the court, ad litem reporting shall be governed by the following:
  - (1) No reports are required of attorney ad litem in a guardianship matter to avoid compromising the attorney work product or other privilege;
  - (2) Reports shall be filed by guardian ad litem based on the timing specified by the court;
  - (3) Counsel serving in a dual role of both attorney ad litem and guardian ad litem shall file reports only if the portion of the report relating to the role of guardian ad litem can be addressed without compromising the attorney work product or other privilege;

Notwithstanding the foregoing, attorney ad litem reports shall be required in all probate proceedings unless otherwise directed by the court. All reports shall be in writing, except supplemental updates at the time of a hearing which may be presented orally at the direction of the court.

- (d) In any case for which an attorney has been appointed, the ad litem should consider filing an application for security for costs pursuant to Rule 143 of the Rules of Civil Procedure and Section 12 of the Probate Code.
- (e) All ad litem serve at the pleasure of the court.

Rule 1.11: Specific Notice Requirements. [REPEALED]

### Rule 1.12: Attorney Fee Standards.

All applications for attorney fees shall be in accordance with applicable law. The court publishes, and from time to time may revise, "Standards for Court Approval of Attorney Fee Petitions". Copies are available from the court and also are available on the court's website.

## **CHAPTER 2: CASES**

### Rule 2.1: Docketing Instructions

Unless otherwise specified by statute, the Presiding Judge of the state's Statutory Probate Courts shall direct the County Clerk in the matters of filing, docketing and transferring cases within the jurisdiction of the statutory probate court in the county. The Presiding Judge shall give such direction based upon the request and through orders and instructions given by the Statutory Probate Judge of the county unless the administration of justice requires otherwise. Directions and instructions given by the Statutory Probate Judge of the county shall be effective and deemed given by authority and consent of the State Presiding Statutory Probate Judge unless specifically controverted, cancelled, or withdrawn by the State Presiding Statutory Probate Judge in writing directed to the County Clerk.

### Rule 2.2: Filing Papers

- (a) All pleadings, motions, notices, briefs, proposed orders, proposed judgments, and any other paper, document or thing made a part of the record shall be filed with the Clerk.
- (b) Proposed orders and judgments shall be presented to the court and may be ruled upon after the presenting counsel has:
  - (1) Obtained written approval of said proposed order or judgment by all other counsel, including ad litem appointed by the court;
  - (2) Presented said order of judgment to opposing counsel and/or pro se parties a minimum of ten (10) days before submission of the same to the court (mailbox rule applies). At the time of submission, the presenting party shall certify compliance with this requirement and state in the certificate the substance of all communications received from opposing counsel and/or pro se parties regarding the form of the proposed order or judgment; or
  - (3) Filed a copy of the proposed order or judgment with the court and served notice thereof on all other counsel and pro se parties. Such proposed orders or judgments are subject to being held by the court for a period of ten (10) days before the court will take action, after which the court may act on such proposed order or judgment without further notice to the parties.

The court may act immediately upon any proposed order or judgment submitted in compliance with this rule without further notice to parties. Objections to the form of a proposed order or judgment must be submitted in writing, copied to opposing counsel and pro se parties and be accompanied by an alternate form of the proposed order or judgment. Nothing contained in this rule shall prevent the court from entering its own form of order or judgment, nor restrict the court's ability otherwise to enter orders.

- (c) No amendment to a pleading shall be filed less than seven (7) days prior to the date a case is set for trial. Any amended pleading offered for filing within seven (7) days of the date of trial shall be considered only as a trial amendment pursuant to Rule 66, Texas Rules of Civil Procedure and shall be filed only after obtaining leave of court, upon motion and notice to all adverse parties.

- (d) Notwithstanding the foregoing, or any trial setting, any order sustaining a special exception or taking action necessitating the filing of an amended pleading shall be deemed to grant leave to file such pleading within twenty (20) days after the rendition of such order unless such order specify a different time limit, if any, within which such pleading shall be filed.

### Rule 2.3: The Setting of Cases

- (a) The court shall promulgate a yearly calendar showing which weeks shall be jury or non-jury.
- (b) Non-jury matters may be set and tried in jury weeks subject to the jury docket.
- (c) At the court's discretion, subject to the availability of jury panels, the court may call to trial any jury matter during a non-jury week.
- (d) All jury and non-jury matters will be set by the court upon written or oral request of any party (unless the court specifies it must be in writing), and will be placed on the docket for each week, day, or half-day in the order in which such requests are received. Judges should not be requested to sign orders setting cases except when a show cause order is necessary, or when some rule of law requires that an order for a setting be signed by a Judge and entered in the minutes by the Clerk.
- (e) Temporary guardianship hearings and other matters involving exigent circumstances will take priority over other proceedings.
- (f) Each request for a non-jury setting shall include an estimate of the hearing time required for the matter being set, and the notice of such setting that the party requesting the setting gives to other parties shall state said time estimate.
- (g) The court may establish an uncontested docket procedure. If established, uncontested matters and routine matters of very short duration may be set on the uncontested docket by calling the court administrator. The uncontested docket consists generally, but is not necessarily limited to, issuance of letters testamentary, probate of wills as a muniment of title, issuance of letters of administration, and declarations of heirship.
- (h) The court hears a mental health docket at least weekly at a regularly scheduled time after the appropriate paperwork is filed with the probate clerk's office.

### Rule 2.4: Resolution of Conflicting Settings

- (a) Where a counsel has settings in two or more courts, such conflict preference shall be as follows:
  - (1) Trials on the merits in any court take precedence over hearings, motions and other temporary matters in any other court;
  - (2) All proceedings in any court take precedence over depositions and other out of court discovery activities; and
- (b) Any counsel having a previously scheduled oral argument in any appellate court shall be given a reasonable time to travel to and from that court and make argument provided the attorney advises the trial judge of the scheduled argument before the commencement of trial.

#### Rule 2.5: Disposition of Contested and Ancillary Matters

- (a) On its own motion or by agreement of the parties and counsel, the court will refer a case for resolution by an alternate dispute resolution procedure under Chapter 154, Civil Practice and Remedies Code. Any party or counsel may move for such referral if agreement cannot be reached.
- (b) Pre-trial hearings or orders will not be required in every case, but upon request of any Counsel or on its own motion, the Court may set a hearing under Rule 166, Texas Rules of Civil Procedure, to consider such matters as might aid in the disposition of the action, including the entering of a pre-trial order. A form of a pre-trial order is attached hereto as Appendix B.
- (c) Except for routine matters of very short duration, a scheduling conference will be scheduled by the court administrator within thirty (30) days after the filing of an answer in every case. The parties may elect to provide the court with an agreed scheduling order prior to the date of the scheduling conference in which case a hearing will be required only at the discretion of the Judge. A form of a scheduling order is attached hereto as Appendix C.

[NOTE: APPENDICES AND FORMS ARE STILL UNDER REVIEW BY THE REPTL RULES COMMITTEE]

- (d) Cases will be set for trial by the court upon written or oral request and representation of any counsel that the case will be ready for trial. If an oral request is made, the counsel making such request must immediately follow up such request in writing to all counsel with a copy to the court. The request may ask for a setting on a specific trial week, but no sooner than 45 days from the date of request, unless leave of court is obtained, or all counsel agree to an earlier setting. The request must be sent to all counsel. Any counsel will file a written response to the request within seven (7) days after receipt stating any objection to the request for setting. The objecting counsel must then request a hearing and, after the hearing, unless the court determines that the case is not ready for trial, the case will be set for trial on the date requested or the nearest date that the docket of the court will permit.
- (e) At the time of making a request for setting, counsel shall inform the court of the estimated time for trial. Counsel shall make a good faith estimate of the time required after consulting all counsel and considering the following: proper examination of witnesses, introduction of exhibits, cross-examination and rebuttal of witnesses reasonably anticipated to be called by all of the parties. In the event that the time requested is not sufficient, the court may continue the matter until such date and time as the court's docket allows. If the court finds that the counsel requesting the trial setting has misrepresented the reasonable time required in bad faith, the court may impose appropriate sanctions, including attorneys' fees occasioned by any delay in trial and costs and expenses for travel of witnesses and parties who are required to return at a later date as a result of the continued setting.

#### Rule 2.6: Motion for Continuance, Agreed Passes and Settlements

A trial or hearing date cannot be postponed or changed without the consent of the court.

- (a) Except as hereinafter provided, any motion for continuance will be filed no later than five (5) days preceding the trial or hearing date. Any motion for continuance based upon facts which occur on or after the fifth day preceding the trial or hearing date will be filed as soon as possible and will be heard at a time to be set by the court.
- (b) In the event counsel agree to continue any trial or other hearing, counsel initiating the request for continuance shall immediately notify the court and the court will decide whether to grant such continuance. If such counsel fails to notify the court within a reasonable time before the

scheduled trial or hearing, the court may impose appropriate sanctions against such counsel or the party represented by such counsel.

- (c) If the parties reach a settlement, counsel representing the party seeking affirmative relief, shall notify the court in writing of such settlement, and that the trial or hearing date is no longer needed. If such counsel fails to so notify the court within a reasonable time before the trial or hearing, the court may impose appropriate sanctions against such counsel or the party represented by such counsel.
- (d) Upon notification to the court of settlement, the matter shall be set for a status conference in thirty (30) days.

#### Rule 2.7: Pre-Trial

- (a) If not otherwise addressed in a Scheduling Order and Discovery Control Plan, a party may request, or the court may, at its discretion, order a pre-trial conference to take care of preliminary matters, including all pending dispositive motions.
- (b) Counsel will be expected at pre-trial to advise the court which issues will be disputed and to be familiar with the authorities applicable to the questions of law raised at pre-trial. Failure to conform to this rule shall be grounds for postponement of the trial, setting of further pre-trial hearings, or other appropriate sanction.
- (c) If the counsel for either party fails to appear at a pre-trial conference the court may:
  - (1) Rule on all motions, dilatory pleas and exceptions in the absence of such counsel.
  - (2) Declare any motions, dilatory pleas, or exceptions of such absent party waived.
  - (3) Advance or delay the trial setting according to the convenience of counsel present.
  - (4) Pass and reset the pre-trial.
  - (5) Where the absent counsel represent the Plaintiff, the court may decline to set the case for trial or may cancel a setting previously made, or the court may dismiss the case for want of prosecution, especially where there has been a previous failure to appear or where no amendment has been filed to meet exceptions previously sustained.
- (d) Counsel attending the pre-trial shall either be the attorney who expects to try the case, or shall be familiar with the case and be fully authorized to state his party's position on the law and the facts, make stipulations and enter into settlement negotiations as trial counsel. If the court finds that the counsel is not qualified, the court may deem that no counsel has appeared and proceed in any of the ways enumerated above.

#### Rule 2.8: Trial Procedure

- (a) Unless otherwise specified in a scheduling order or leave of court is obtained, any party or counsel filing special exceptions, pleas in abatement, or other dilatory pleas shall request and obtain a hearing on them at least thirty (30) days prior to the trial date or as soon as possible after the pleading is filed if the pleading is filed within thirty (30) days of the trial date. Any such matters not heard are waived.

- (b) All Contested and Ancillary matters are specially set unless otherwise notified. Counsel may request one, and only one, additional setting as a second setting. A second setting will be called to trial, for that date and time, if the case with the number one setting is unable to proceed for any reason.
- (c) Unless ordered otherwise, at the time the parties and counsel report for trial they will deliver to the court and the other counsel a witness list, exhibit list, any motion in limine and any requested instructions and questions if a jury trial. Any witnesses or exhibits not shown on such list can be used at the trial only upon leave of the court. Prior to commencement of trial all exhibits will be marked, exchanged and examined by counsel so that the trial will not be delayed by such examination.
- (d) Counsel intending to offer videotaped depositions or other films at trial, except those offered solely for impeachment, must make such tapes and films available to opposing counsel sufficiently in advance of trial so that a hearing on any objections can be held before commencement of trial. Any tapes or films not so tendered will not be permitted into evidence at the trial. All counsel must timely examine any tendered tapes or films and request a hearing immediately if there are objections to the admissibility of any part of the tapes or films. Any objections not heard prior to trial will be waived.
- (e) It is the responsibility of each counsel to stipulate to all facts which are not in dispute and to waive formal proof as to any documents to be introduced about which there is no dispute as to authenticity.

#### Rule 2.9: Motion Practice

- (a) Counsel are directed to use all reasonable means to resolve pre-trial disputes to avoid the necessity of judicial intervention.
- (b) No motions, objections or special exceptions will be set for hearing unless the moving counsel shall have certified in such motion or in a letter substantially the following:

“A conference was held on (date) with (name of opposing counsel) on the merits of this motion. Agreement could not be reached. Therefore, it is presented to the court for determination.”

or

“A conference was not held with (name of opposing counsel) on the merits of this motion because (explanation of inability to confer).” Note that a statement that opposing counsel was “unavailable” is insufficient. Every effort to confer must be made.
- (c) Court personnel are responsible for scheduling the dates and times for hearings. Upon receiving the date and time of hearing, the moving counsel shall immediately notify all counsel in writing as to the date, time and subject matter of the hearing. A copy of this communication shall be provided to the court administrator.
- (d) By agreement, counsel may submit matters for ruling by the Judge or Associate Judge without a personal appearance and oral presentation. The Judge or Associate Judge should be advised in writing when such procedure is desired.
- (e) At the time of making a request for setting on a motion, counsel shall inform the court of the estimated time for hearing. counsel shall inform the court of the estimated time for hearing. counsel shall make a good faith estimate of the time required after consulting all counsel and

considering the following: proper examination of witnesses, introduction of exhibits, cross-examination and rebuttal of witnesses reasonably anticipated to be called by all of the parties. In the event that the time requested is not sufficient, the court may continue the matter until such date and time as the court's docket allows. If the court finds that the counsel requesting the hearing has misrepresented the reasonable time required in bad faith, the court may impose appropriate sanctions, including attorney's fees occasioned by any delay in the hearing, costs and expenses for travel of witnesses and parties who are required to return at a later date as a result of the continued setting.

#### Rule 2.10: Hearings Conducted by Electronic Devices

Any party may request that a short hearing be conducted by telephone conference call or other electronic device, or that a party be allowed to participate in a hearing electronically. The requesting party shall make the request in writing to the court with advance notice to all other parties. Any party objecting should notify the court. At the discretion of the Judge, a court reporter or recording device may be required by the court during these calls. A Judge may, at any time, determine that a hearing by electronic device is not acceptable and may require a hearing in court upon notice to all parties. Upon notice to the parties, the court may conduct a hearing by telephone or other electronic device on its own motion.

#### Rule 2.11: Deposition Guidelines

- (a) In an attempt to have uniformity and save time and expense resulting from hearings on discovery matters, the following guidelines will generally be followed by the courts on matters pertaining to oral depositions. A deposition may be noticed in:
- (1) The county of the witness's residence or the county where the witness is employed or regularly transacts business in person;
  - (2) The county of suit if the witness is a party or a person designated by a party under Rule 199.2(b)(1);
  - (3) The county where the witness was served with the subpoena, or within 150 miles of the place of service, if the witness is not a resident of Texas or is a transient person; or
  - (4) Any other convenient place directed by the court in which the cause is pending.
  - (5) The party initiating a deposition may elect to take the deposition orally or on written questions and all counsel may elect to cross-examine orally or on written questions.
  - (6) Unless the parties through their counsel otherwise agree, reasonable fees charged by an expert for giving of deposition testimony shall be paid by the party retaining the expert. The fee shall be considered reasonable if the fee is calculated at the same hourly rate which is being charged to the party by whom the expert is employed. If counsel cannot agree to a reasonable fee the counsel requesting the deposition may ask the court to set a reasonable fee. The fee for the preparation of an expert's report, not previously reduced to writing and sought under Rule 195.5, Texas Rules of Civil Procedure, shall be paid by the party by whom the expert is employed.
  - (7) Notice of less than ten (10) days under Rules 21a and 202.3(a), Tex. R. Civ. P. shall be presumed to be unreasonable.

Although, these matters are best handled by agreement of the parties, counsel are not precluded from submitting disputes as to such matters to the court for determination by proper motion and hearings.

- (b) Counsel initiating an oral deposition shall first attempt to communicate with all counsel to determine whether agreement can be reached as to date, time, place and materials, to be furnished at the time of deposition. Any written notice of deposition shall state as follows:

“A conference was held (or attempted) with opposing counsel to agree on a date, time, place and materials to be furnished. Agreement could not be reached (or counsel will not respond) and the deposition is therefore being taken pursuant to this notice (or agreement was reached and this notice complies with the agreement).”

Failure to hold such conference or to make adequate attempt to hold such conference prior to noticing a deposition shall be grounds to quash the deposition.

#### Rule 2.12: Matters Requiring Immediate Action

- (a) An application for action or relief, including but not limited to, restraining orders, receivership, temporary administration, temporary guardianship, proceedings for examination and delivery of the contents of safe deposit boxes or any papers of a decedent pursuant to Sections 36B through 36F of the Texas Probate Code, shall not be presented to the Judge or the Associate Judge until the application or case has been filed with the clerk, unless it is impossible to do so. If it is impossible to file an application or case before it is presented to the Judge or Associate Judge, then it shall be filed as soon thereafter as possible, and the clerk notified of all actions taken by the Judge or Associate Judge.
- (b) Every application for action or relief of any kind shall be presented first to the Judge of the court to which it is assigned. If neither the Presiding Judge nor the Associate Judge are able to hear the case, another Statutory Probate Judge shall be assigned to hear the case. After a Judge or Associate Judge has announced a ruling on the application or deferred ruling, the application shall not be presented to any other Judge without leave of the Judge to which it was first presented.
- (c) Every application for relief ex parte shall contain a certificate signed by counsel that:
- (1) To the best of their knowledge whether or not the party against whom relief sought ex parte is represented by counsel in the matter made the basis of the relief sought; or,
  - (2) If the party against whom relief is sought ex parte is represented by counsel, the certificate shall state the name, address, and telephone of such counsel, if known. Movant should give counsel notice of at least 2 hours that the movant intends to present the application to the court at a given time and place, unless otherwise directed by the court.

#### Rule 2.13: Private Service of Process

- (a) For purposes of supervision and discipline the court deems those persons authorized to serve citations and other notices by order pursuant to Rule 103, Texas rules of Civil Procedure, to be officers of the court. Any such person filing a false return or engaging in service contrary to law or rule may be subject to punishment by an order of contempt. Such order may prohibit such person from serving citations and notices in this County.
- (b) Any proposed order authorizing private service under Rule 103 will not be signed by the Judge or Associate Judge unless accompanied by a certificate signed by counsel requesting such an appointment. Such certificate shall set out the name and address of the person to be so authorized and affirm that such person is not less than eighteen years of age, is not a party, and has no interest in the outcome of the suit in which the authorization is sought.

- (c) Any proposed order authorizing private service shall be in conformance with any standing Order procedure administered by the Denton County District Clerk on behalf of all courts of record in Denton County.

**Rule 2.14: Motions to Withdraw as Attorney of Record and Motions to Substitute Counsel**

- (a) A motion to withdraw as attorney of record will be granted without a hearing only if the moving attorney:
  - (1) Files a written consent to the withdrawal signed by the client, or
  - (2) Includes in the motion a specific statement of the circumstances that prevent the moving attorney from obtaining the client's written consent and certifies that a copy of the motion to withdraw was mailed to the last known mailing address of the client.

If a motion to withdraw and to substitute another attorney is made within sixty (60) days of any scheduled court date or hearing, and includes an appearance by another attorney pursuant to Rule 10 and Rule 57, Texas Rules of Civil Procedure, no written consent shall be required of opposing counsel. If no substitute counsel files appearance simultaneously with such withdrawal, the movant must notify opposing counsel and a hearing may be scheduled to allow objection to such withdrawal to the extent it may cause delay in such scheduled court date or hearing.

- (b) Any motion to withdraw or to substitute another attorney not complying with subsection (a) above must be presented at a hearing after notice to the client and to all other parties.

**CHAPTER 3: DISMISSAL FOR WANT OF PROSECUTION**

**3.1 Case Selection:**

The following cases are eligible for dismissal for want of prosecution under this chapter pursuant to T.R.C.P. 165a:

- (a) Cases on file for more than 180 days in which no answer has been filed.
- (b) Cases which have been on file for more than twelve months and are not set for trial and have had no filings or settings within 180 days.
- (c) Cases in which a party or the party's attorney has failed to take any action specified by the court.
- (d) Any other case designated by the court.

**3.2 Notice**

Pursuant to Rule 165a, Texas Rules of Civil Procedure, the court shall give notice that certain cases will be dismissed for want of prosecution. Such matters will be dismissed on the date indicated in the notice of dismissal.

**CHAPTER 4: RULES OF DECORUM**

**4.1: General Rules of Courtroom Conduct**

- (a) All officers of the court except the Judge and jurors, and all other participants except witnesses who have been placed under the rule, shall promptly enter the courtroom before the

scheduled time for each court session. When the bailiff calls the court to order, complete order should be observed.

- (b) In the courtrooms, there shall be:
  - (1) No tobacco use;
  - (2) No chewing gum;
  - (3) No reading of newspapers or magazines;
  - (4) No bottles, cups or beverage containers except bottled water or court provided water pitchers and cups, except by jurors;
  - (5) No food;
  - (6) No propping of feet on tables or chairs;
  - (7) No noise or talking that interferes with court proceedings, including but not limited to cellular phones;
  - (8) No use of electronic devices by jurors.
- (c) The Judge, the Counsel, and other officers of the court will refer to and address other court officers or participants in the proceedings respectfully and impersonally, as by using appropriate titles and surnames rather than first names.
- (d) The oath will be administered in a manner calculated to impress the witness with the importance and solemnity of the promise to adhere to the truth.
- (e) All persons appearing before the court shall dress appropriately for court sessions.

#### 4.2: Conduct of Counsel

- (a) Counsel should observe the letter and spirit of the Lawyer's Creed and all canons of ethics, including those dealing with discussion of cases with representatives of the media and those concerning improper *ex parte* communications with the Judge.
- (b) Counsel should advise their clients and witnesses of local Rules of Decorum that may be applicable;
- (c) All objections, arguments, and other comments by counsel shall be directed to the Judge, or jury and not to opposing counsel;
- (d) While another attorney is addressing the Judge, or jury, an attorney should not stand for any purpose except to claim the right to interrupt the attorney who is speaking;
- (e) Counsel should not approach the bench without leave of court and must never lean on the bench;
- (f) Counsel shall remain seated at the counsel tables at all times except:
  - (1) When the Judge enters and leaves;
  - (2) When addressing the Judge or jury; and

- (3) Whenever it may be proper to handle documents, exhibits, or other evidence. (Leave of court is not required.)
- (g) Counsel should anticipate any need to move furniture, appliances, or easels, and should make advance arrangements with the bailiff. Tables should not be moved during court sessions.

# Notice

There should only be one style per pleading. This will ensure that the pleadings are filed in the correct case.

## APPENDIX A

✚ **Probate Cases:**

- IE Independent Executor
- IA Independent Administration
- DA Dependent Administration
- MT Muniment of Title
- DH Declaration of Heirship
- UP Unclassified Probate / Informal Probate

**SAMPLE STYLE FOR A PROBATE CASE:**

Cause No. \_\_\_\_\_

**IN RE: Estate of** § **IN THE PROBATE COURT**  
\_\_\_\_\_, §  
§  
§  
§  
**Deceased** § **DENTON COUNTY, TEXAS**

✚ **Guardianship Cases:**

- GM Guardianship of a Minor
- GA Guardianship of an Adult
- GO Guardianship other, Deposit of trust funds for a minor without formal Guardianship

**SAMPLE STYLE FOR A GUARDIANSHIP CASE:**

Cause No. \_\_\_\_\_

**IN RE: Guardianship of** § **IN THE PROBATE COURT**  
\_\_\_\_\_, §  
§  
§  
§  
**Alleged Incapacitated Person** § **DENTON COUNTY, TEXAS**

✚ **Ancillary / Contested Matter to above type case or Civil Suit:**

(These have the original case number with an -01 -02 at the end)

- ED Eminent Domain (Condemnation)
- TI Temporary Injunction
- RT Real Estate Trust

**SAMPLE STYLE FOR AN ANCILLARY CASE:**

Cause No. \_\_\_\_\_

**Plaintiff** § **IN THE PROBATE COURT**  
**Vs.** §  
§  
§  
**Defendant** § **DENTON COUNTY, TEXAS**

## APPENDIX B

### STYLE

### JOINT PRE-TRIAL ORDER

#### APPEARANCE OF COUNSEL

(List the parties, their respective counsel and the address and telephone numbers of counsel in separate paragraphs.)

#### STATEMENT OF THE CASE

(Give a brief statement of the case for the information of the court.)

#### MOTIONS

(State if there are any pending motions)

#### CONTENTIONS OF THE PARTIES

(State concisely in separate paragraphs what each party claims.)

#### ADMISSIONS OF FACT

(List all facts which have been stipulated and admitted and require no proof.)

#### CONTESTED ISSUES OF FACT

(List all factual issues in controversy necessary to the final disposition of this case.)

#### AGREED APPLICABLE PROPOSITIONS OF LAW

(Delineate those legal propositions not in dispute.)

#### CONTESTED ISSUES OF LAW

(State briefly the issues of law in dispute, with a memorandum of authorities supporting each issue.)

#### EXHIBITS

1. Each counsel will attach to the JOINT pre-trial order a copy of the list of all exhibits to be offered and will make all such exhibits available for examination by opposing counsel. This rule does not apply to rebuttal exhibits, which cannot be anticipated.

2. Any counsel requiring authentication of an exhibit must so notify in writing the offering counsel within five (5) days after the exhibit is made available to opposing counsel for examination. FAILURE TO DO SO is an ADMISSION of authenticity.
3. Any other objections to admissibility of exhibits must, where possible, be made at least three (3) business days before trial, and the court notified in writing with copies to all counsel accompanied by supporting legal authorities and copies of the exhibits in dispute.
4. The offering party will MARK HIS OR HER OWN EXHIBITS.
5. All exhibits will be OFFERED and RECEIVED in evidence as the FIRST ITEM OF BUSINESS at the trial.

#### WITNESSES

1. List the names and addresses of witnesses who will or may be used with a brief statement of the subject matter and substance of their testimony.
2. Include in this section the following:

“In the event there are any other witnesses to be called at the trial, their names, addresses and the subject matter of their testimony shall be reported to opposing counsel as soon as they are known. This restriction shall not apply to rebuttal or impeaching witnesses, the necessity of whose testimony cannot be anticipated before the time of trial.”

#### SETTLEMENT

(Include a statement that all settlement efforts have been exhausted, that the case cannot be settled, and will have to be tried.)

#### TRIAL

(Include in this paragraph the following:

- a. Probable length of trial; AND
- b. Availability of witnesses, including out-of-state witnesses.)

#### ATTACHMENTS

(Include the following REQUIRED attachments:

- a. For a jury trial: Proposed Special Issues, including instructions or definitions.
- b. For a non-jury trial: Proposed findings of fact and conclusions of law, with supporting authorities in a memorandum of law.)

SIGNED on \_\_\_\_\_, 20\_\_\_\_.

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Judge Presiding

STYLE  
DOCKET CONTROL ORDER

1. \_\_\_\_\_ *NEW PARTIES* shall be joined and served by this date. The party causing such joinder will provide copies of this order to the new parties.
2. \_\_\_\_\_ *EXPERTS* for all moving parties shall be designed by this date. Experts for all other parties shall be designated, 30 days after this date. No additional experts will be permitted to testify except for good cause shown.
3. \_\_\_\_\_ *DISCOVERY* shall be completed by this date. counsel may by agreement continue discovery beyond this deadline; such continued discovery, however, shall not constitute grounds for any delay of the trial date.
4. \_\_\_\_\_ *AMENDMENTS* to the moving parties' pleadings shall be filed by this date. Where responsive pleadings are necessary, all responding parties pleadings must be filed within ten (10) days of this date.
5. \_\_\_\_\_ *JOINT PRE-TRIAL ORDER* shall be filed by this date in the form enclosed with the notice of this order.
6. \_\_\_\_\_ *PRE-TRIAL CONFERENCE* will be held. Trial counsel are ordered to attend and be prepared to discuss all aspects of the suit and trial.
7. *SPECIAL ORDERS:*

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SIGNED on \_\_\_\_\_, 20\_\_\_\_.

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*Judge Presiding*

[NOTE: THIS LAST FORM OF APPENDIX B REMAINS UNDER REVISION BY THE REPTL RULES COMMITTEE AND IS SUBJECT TO BEING COMBINED AND REPUBLISHED AS AN INTEGRATED APPENDIX C. SEE FOLLOWING.]

# APPENDIX C

## STYLE

### SCHEDULING ORDER

It is ORDERED pursuant to Rule 190.4 that discovery in this case be conducted in accordance with this Plan and that the parties shall meet and adhere to the following deadlines:

1. Deadline to add parties. All new parties shall be added no later than \_\_\_\_\_.
2. Deadlines to designate testifying expert witnesses:
  - a. Plaintiff shall designate testifying expert witnesses no later than \_\_\_\_\_.
  - b. Defendant(s) shall designate testifying expert witnesses no later than \_\_\_\_\_.
  - c. Any party designating a testifying expert witness is ORDERED to provide, no later than the dates set forth above for designation, the information set forth in Rule 194.2(f) and a written report prepared by the expert setting forth the substance of the expert's opinion.

An expert not designated prior to the above deadlines shall not be permitted to testify unless good cause is shown for late designation.

3. Limits on discovery:
  - a. Total time for oral deposition: \_\_\_\_\_ hours per side. "Side" is defined in Rule 190.3(b)(2). (The default time is 50 hours in Level 2 cases).
  - b. Any party may serve on any other party no more than \_\_\_\_\_ written interrogatories, excluding interrogatories asking a party only to identify or authenticate specified documents. (The default limit is 25 interrogatories).
4. Discovery period ends \_\_\_\_\_.
5. Deadline to amend or supplement pleadings: \_\_\_\_\_.
6. Mediation. The parties are ordered to attend mediation on or before \_\_\_\_\_. The parties shall submit an agreed order naming a mediator agreed to by the parties to the court within 30 days of this order. If no such order is submitted within 30 days of this order, the court hereby appoints the following person to serve as mediator in this case:

Name: \_\_\_\_\_ Address: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

No later than 30 days prior to the mediation deadline set forth above, the parties shall agree with the mediator on a specific date to conduct mediation.

7. Pre-trial conference shall take place on \_\_\_\_\_ at \_\_\_\_\_ m.

The parties are ordered to exchange with each other prior to the pretrial conference the items checked below.

- \_\_\_ Proposed jury instructions and questions (jury trial).
- \_\_\_ Proposed finding of fact and law (non-jury trial).
- \_\_\_ Motions in Limine.
- \_\_\_ Exhibit lists using the format of the sample attached to this order.
- \_\_\_ Labeled and numbered exhibits. The parties are ordered per Rule

192.5 (c)(2) to exchange prior to the pretrial conference all exhibits they intend to introduce at trial and to make good faith efforts to reach agreement on the admissibility of all exhibits. The parties should be prepared to discuss at the pretrial conference objection to exhibits which the parties do not agree are admissible.

\_\_\_\_\_ Witness list stating each witness' name, address, and phone number and stating whether the witness is a party, a fact witness or an expert witness. The parties should be prepared to discuss at the pretrial conference any scheduling problems relating to witnesses and any objections to improperly designated experts or fact witnesses.

8. Trial

\_\_\_\_\_ Trial is set for \_\_\_\_\_ at \_\_\_\_\_ .m

NO MOTIONS FOR CONTINUATION SHALL BE GRANTED. FAILURE TO APPEAR FOR TRIAL ON THAT DATE SHALL CAUSE THIS CASE TO BE DISMISSED FOR WANT OF PROSECUTION.

SIGNED on \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Judge Presiding

Agreed to by counsel and pro se parties:

\_\_\_\_\_  
  
\_\_\_\_\_

\_\_\_\_\_  
  
\_\_\_\_\_