

inheritance investigation

our second area of expertise is related to genealogy: we are established experts in finding heirs.

when a family congregates for the funeral of a person it is usually known who the heirs will be. perhaps the heirs are relieved when money is left over after the funeral's costs and other expenses have been met

in other cases the situation is reversed and an estate remains while, for any number of reasons, the heirs are not known to friends or authorities. if no will has been recorded, statutory succession will decide who is entitled to the estate. this means that the monies from the estate is divided according to certain rules (as stipulated in the law) to certain relatives. as these relatives did not keep in touch with the deceased, referred to as **decedent**, or did not know that they are related as they did not personally know him/her because the family bond was too remote, the potential heirs are not aware of the death and the possibility to inherit.

in such cases authorities or appointed administrators try to find heirs. once this proves to be too difficult they sometimes consult a genealogist or inheritance investigator like us.

we offer the following services:

- [searching unknown heirs](#)
- finding and collecting the required documents, if a customer/heir is not in the position to find all the necessary [proof](#) demanded from the court

- the [settlement](#) of estates including the distribution of the assets according to the stipulated ratios

the sequence of these services represents the chronological steps that need to be taken in the process of settling estates: at the beginning it is essential to find all persons entitled to an estate. this task is finished once all family members and persons have been found who are entitled to a share. the next step is to collect all documents and proof that the court requires and which include an extensive summary of the legal links that entitle each potential heir to inherit. this needs to be submitted to the court (or the authorities that issue the legal title to an estate) which is then in a position to issue the title to each heir according to his/her share. the legal title to the estate introduces the final phase of the resolution which includes accounting and documentation for the heirs. our services may be requested at any stage of these proceedings.

there are different models for the reimbursement ([f](#)ees) of our services relating to inheritance investigations and inheritance administration.

please note, we offer to send [reference](#) s to potential customers.

the following brief summary of inheritance laws is supposed to give you an idea of what we are doing in this line of work:

legal order of succession

legal succession shows a marked hierarchical order in nearly all european countries. in germany it is known as *erbordnung*, in switzerland as *parentel*: apart from the rights of a marriage partner or spouse, the inheritance rights of the deceased person's children jointly constitute the 1st order of heirs. if there are neither spouse nor children it is the parents of the decedent and their children that constitute the 2nd order of heirs (*parental parentel*). should there be no heirs in the second order, the grandparents on the mother's and the father's side come equally into consideration. they form the heirs of the 3rd order (*grandparent parentel*). more distant inheritance orders (e.g. great grandparents and their descendants) can make claims only according to german law. in switzerland the rights to an inheritance are confined to the third order, i.e. the grandparents and their descendants. if no heirs exist (or make a claim) the state treasury receives all funds, assets, rights and entitlements.

inheritance and lines of descent

within an order of inheritance two important rules need to be considered:

a) a living decendant excludes more distantly related relatives: for example the child of a decedent excludes the potential rights of his or her own children (i.e. the decedent's grandchildren). a decedent's surviving parent rules out the rights of his or her children.

b) rules guiding inheritance in the lines of descent: the entire estate will always be divided into equal fractions which are defined by the number of children. each child is entitled to the same share as his or her sibling. when a child has already died his or her heirs receive its share only. this may well be a different entitlement than an heir of the senior generation is entitled to. a decedent who had altogether 3 children, but lost a child before his/her own death will pass on to his surviving two children 1/3 of the estate if the deceased child has itself no living descendants, its share is split between the surviving siblings equally, so that each child receives half of the estate. surviving children receive each 1/3 from the overall estate while the descendants of the deceased child share the remaining third of the total estate. this rule no longer applies after the third order of inheritance because all heirs inherit equal shares from the fourth order of descent onwards (division according to heads).