

Small Estate Checklist

Name of Decedent: _____ Envelope Number: _____

Clerk Initials and Date: _____

- _____ Affidavit (ORS 114.525) _____ If amended, fee included and complies with ORS 114.515(6)-(7)
 - _____ No probate filed
 - _____ Notice of duty language directly under case caption (ORS 114.525(1)(a))
 - _____ Statement re: correctional facility 15 years prior to death (ORS 114.525(1)(t))
 - _____ If yes, statement will mail copy to department of corrections
 - _____ Statement re: application/petition for appointment of PR (ORS 114.525(4))
 - _____ Venue (Place of death, domicile, location of property)
 - _____ Name and address of affiant (heir, devisee, creditor, personal representative)
 - _____ Affiant case history/criminal background
 - _____ Statement re: affiant has not been convicted of a felony (ORS 114.525(1)(r) and ORS 114.515(2)(b))
 - _____ Decedent's information (name, age, last four digits of social security number, home or mailing address, date of death, and place of death [ORS 114.525(1)(e)-(f)])
 - _____ Time of Filing (30 days from date of death [ORS 114.515(3)] or 60 days if creditor)
 - _____ Date of death is before **January 1, 2020**
 - _____ Decedent's Estate
 - _____ Real Property under \$200,000 (ORS 114.510)
 - _____ Legal description of real property (ORS 114.525(1)(g))
 - _____ Verification of property value/statement of real market value at death
 - _____ Personal Property under \$75,000 (ORS 114.510)
 - _____ Items over \$500 separately itemized
 - _____ Vehicles (year, make, model, and estimate of fair market value)
 - _____ Bank account (bank name, type of account, estimated value)
 - _____ Bond (type and fair market value at death)
 - _____ Stocks (company name, number of shares, and fair market value)
 - _____ Safety Deposit Box (inventory with contents and value [ORS 114.537])
 - _____ Inventory due date (required 30 days after filing)
 - _____ Manufactured home if not real property (year, make, model, location, license plate)
 - _____ Other (e.g. life insurance or pension – clear description)
 - _____ Heirs (name, relationship to decedent, and last known address [ORS 114.525(1)(j)])
 - _____ Distribution surviving spouse and non-joint children (ORS 112.065 and ORS 112.025)
 - _____ Devisees (name and address [ORS 114.525(1)(k)])
 - _____ Heirs and devisees age of majority
 - _____ Statement of notice to heirs by mail (ORS 114.525(1)(j))
 - _____ Statement of notice to devisees by mail (ORS 114.525(1)(k))
 - _____ Distribution (ORS 114.525(1)(L))
 - _____ Statement re: reasonable efforts to ascertain creditors (ORS 114.525(1)(m))
 - _____ Known creditors (name, address, amount owed [ORS 114.525(1)(n)])
 - _____ Disputed claims (name, address, and amount [ORS 114.525(1)(o)])
 - _____ Mailing address for presentment of claim and preferred method of notification (ORS 114.525(1)(p))
 - _____ Notice to creditors (ORS 114.525(1)((n)-(o)))
 - _____ Notice to Department of Human Services and Oregon Health Authority (ORS 114.525(1)(s))
 - _____ Statement re: barred claims (ORS 114.525(1)(v))
 - _____ Anticipated administrative expenses and attorney fees (if any) (ORS 114.525(2)(q))
 - _____ Notarized document/witness signature
- _____ Certified Copy of Death Certificate (ORS 114.525(2))
 - _____ If e-filed, death certificate is a separate document (not attached to the affidavit because it must be filed confidentially) – CEDT code automatically makes the document confidential if e-filed.

