

Small Estate Affidavit Checklist

Action Checklist — ClearLegalTips.com (2026)

Claim a small estate the simple way.

Step 1 — Confirm Eligibility

- ☐ Estate is under your state's dollar limit (probate assets only)
- ☐ Required waiting period has passed
- ☐ No probate is open

Step 2 — Gather

- ☐ Certified death certificate
- ☐ List of qualifying assets and values
- ☐ Proof of your relationship/entitlement

Step 3 — Sign

- ☐ Completed your state's required form if one exists
- ☐ Signed before a notary

Step 4 — Claim

- ☐ Presented the affidavit + death certificate to each asset holder
- ☐ Distributed assets to all entitled successors

INSTRUCTIONS FOR USE

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