

Arizona Small Estate Worksheet (2026)

Test the estate against the \$200,000 personal property limit and the \$300,000 real property limit under A.R.S. 14-3971

Arizona has two small estate affidavits. The personal property affidavit is available 30 days after the death and goes to each holder; subsection B names no court filing. Its limit is \$200,000 after liens and encumbrances. The real property affidavit can be filed not sooner than six months after the death in the superior court, with a \$300,000 limit after liens. HB 2116 (2025 Session Law chapter 24) raised the limits from \$75,000 and \$100,000; the 2025 session's general effective date was September 26, 2025. Full guide and sources: clearlegaltips.com/arizona-small-estate-affidavit/

Step 1: Basic facts

Decedent's full name: _____

Date of death: _____

Date 30 days after the death (earliest date for the personal property affidavit): _____

Date six months after the death (earliest date for the real property affidavit): _____

☐ No application or petition for a personal representative is pending, and none has been appointed in any jurisdiction.

☐ Or: a personal representative was discharged, or more than one year has passed since a closing statement was filed (value is then taken as of the date of the affidavit).

Worksheet A: Personal property (limit \$200,000)

Count all personal property in the estate, wherever located, less liens and encumbrances, valued as of the date of death (or as of the date of the affidavit under the discharged-representative alternative). In our reading, assets that pass to a named person by account terms, deed or beneficiary designation (A.R.S. 14-6212, 33-405, 33-431, 14-6101) are not in the estate; ask the holder how it will treat each one.

Asset	Held in decedent's name only?	Value (\$)	Liens or loans against it (\$)

Total value of personal property (\$): _____

Minus total liens and encumbrances (\$): _____

Net personal property (the affidavit states it does not exceed \$200,000) (\$): _____

☐ Net personal property does not exceed \$200,000.

- ☐ The person collecting is the successor entitled to payment or delivery of the property.
- ☐ Funeral expenses and expenses of the last illness have been paid.

Worksheet B: Arizona real property (limit \$300,000)

Value the decedent's interest at the full cash value shown on the assessment rolls for the year of death (the year of the affidavit under the discharged-representative alternative), less liens and encumbrances against the real property. A debt secured by a lien on real property that the decedent held as lender is valued at its unpaid principal balance due at death. A mortgage the decedent owed is a lien and comes off the value.

Property address and county	Full cash value on the assessment rolls (\$)	Mortgage or lien balance (\$)	Net (\$)

Total net real property (the affidavit states it does not exceed \$300,000) (\$): _____

- ☐ Net real property does not exceed \$300,000.
- ☐ Funeral expenses, expenses of the last illness and all unsecured debts have been paid.
- ☐ Signers are entitled by reason of the allowance in lieu of homestead, exempt property or family allowance; by intestate succession as the sole heir or heirs; or by devise under a valid last will (original attached or already probated).
- ☐ No other person has a right to the decedent's interest in the described property, and no federal estate tax is due.
- ☐ A certified copy of the death certificate is ready to attach.

INSTRUCTIONS FOR USE

Figures checked in October 2026 against A.R.S. 14-3971 and 14-3972 and 2025 Session Law chapter 24 (HB 2116). Limits and rules can change, so confirm them with the clerk of the superior court before you sign. This worksheet is general information, not legal advice; for advice on your situation, consult a licensed Arizona attorney. Maintained guide: clearlegaltips.com/arizona-small-estate-affidavit/