

Colorado Small Estate Worksheet (2026)

Test the estate against the limit for the year of death and list the successors for Form JDF 999 (C.R.S. §15-12-1201)

Colorado sets the limit by the year the person died, not the year you sign. Full guide: clearlegaltips.com/colorado-small-estate-affidavit/

Limit by year of death

Year of death	Limit (twice the §15-11-403 amount)
2026	\$88,000
2025	\$86,000
2024	\$82,000
2023	\$80,000
2022	\$74,000
2021	\$70,000
2020	\$70,000

Step 1: The decedent

Decedent's full legal name: _____

Date of death: _____

Date of death + 10 days (earliest signing date): _____

Limit for the year of death (\$): _____

Step 2: Total the property

Use fair market value for the property the decedent owned that is subject to disposition by will or intestate succession, wherever it is located. Real estate counts toward the total even though JDF 999 cannot transfer it.

Item (account, vehicle, stock, land)	Personal or real	Fair market value

Total fair market value (\$): _____

Step 3: Subtract liens and encumbrances

Loan or lien	Lender	Amount

Total liens and encumbrances (\$): _____

Value for the test (Step 2 total minus Step 3 total)

(\$): _____

- ☐ The result does not exceed the limit for the year of death
- ☐ No application or petition for a personal representative is pending or has been granted in any jurisdiction

Step 4: Successors and shares

A successor is a person other than a creditor who is entitled to the property under the will or the probate code. Check the will first. With no will, Article 11 of the probate code decides who inherits.

Successor	Property	Amount, proportion or percentage

Step 5: Who must pay or deliver

Holder (bank, broker, other)	What it holds	Pay or deliver to

Worked example (made-up numbers, 2026 death)

Checking \$31,000 + brokerage \$27,000 + truck \$22,000 less a \$9,000 loan (\$13,000) + paid-off lot \$15,000 = \$86,000. The limit is \$88,000. The lot counts toward the total, but JDF 999 cannot be used to transfer it.

INSTRUCTIONS FOR USE

Checked in October 2026 against C.R.S. §§15-12-1201, 15-11-403 and 15-10-112, the Department of Revenue Probate Index, Form JDF 999 (revised April 28, 2026) and guide JDF 998. General information, not legal advice. Confirm the current form with the Colorado Judicial Branch before you sign.