

Illinois Small Estate Affidavit: Assets & Claims Worksheet (2026)

Total the personal estate against the \$150,000 limit and sort the debts into the seven Illinois claim classes (755 ILCS 5/25-1)

Use this before you fill out the affidavit. For deaths on or after August 15, 2025, the personal estate (leaving out registered vehicles) must be \$150,000 or less; for earlier deaths the limit is \$100,000 and vehicles count. Guide: clearlegaltips.com/illinois-small-estate-affidavit/

Step 1: Quick eligibility check

Decedent's full name: _____

Date of death (on or after Aug. 15, 2025: \$150,000; earlier: \$100,000): _____

County of residence immediately before death: _____

- ☐ No executor or administrator has been appointed (no letters of office outstanding).
- ☐ No petition for letters is pending or contemplated in Illinois or anywhere else.
- ☐ Real estate? Note how it passed (joint owner, transfer on death instrument, or the decedent's name alone). A house in the decedent's name alone needs another route; ask the circuit clerk or an attorney.

Step 2: Assets that count toward the limit

Property in the decedent's sole name with no beneficiary or joint owner, at fair market value.

Asset	Where held / account ending	Fair market value (\$)
Checking account		
Savings / CDs		
Brokerage or investment account		
Stocks or bonds in the decedent's name		
Final wages, refunds, money owed to the decedent		
Jewelry, collectibles, other valuables		

Total counted personal estate (\$): _____

Step 3: Items listed separately or left out

Item	How it is treated
Registered motor vehicles	Listed on the affidavit by make, body type, year and VIN; not counted toward \$150,000. Six vehicle types stop being excluded Jan. 1, 2027 (see the guide)

Item	How it is treated
Life insurance, retirement accounts, payable-on-death accounts with a named beneficiary	Goes to the beneficiary; not counted
Joint accounts with right of survivorship	Goes to the surviving owner; not counted

Vehicle 1: make, body type, year, VIN: _____

Step 4: Known debts by Illinois class (pay Class 1 first)

The affiant must pay valid claims in class order before any distribution. If a class falls short, its claims are paid pro rata.

Class	What it covers	Creditor name and address	Amount (\$)
1	Funeral, burial, administration, custodial claims		
2	Surviving spouse's or child's award		
3	Debts due the United States		
4	Employee wages (up to \$800 each, last 4 months) and medical, hospital, nursing home care in the year before death		
5	Trust money that cannot be traced		
6	Debts due Illinois and local governments		
7	All other claims (credit card balances fall here)		

Total known debts (\$): _____

Amount left for heirs or legatees after all debts

(\$): _____

[] Medicaid check: if the person received Medicaid long-term care help, contact the Illinois HFS Bureau of Collections before you distribute.

INSTRUCTIONS FOR USE

General information, not legal advice; it does not replace the form in 755 ILCS 5/25-1(b). Checked against Illinois statutes and HFS pages in October 2026. Public Act 104-624 changes the vehicle rule on January 1, 2027. Confirm current rules with the circuit clerk or an Illinois attorney. Guide: clearlegaltips.com/illinois-small-estate-affidavit/