

Tennessee Small Estate Worksheet (2026)

Test the \$50,000 limit, list each asset and creditor, and prepare the bond-waiver consents for a petition for limited letters under T.C.A. 30-4-101 to 30-4-104

Tennessee small estates use a sworn petition for limited letters, not a stand-alone affidavit. The probate estate can't exceed \$50,000 in personal property, and the petition must itemize each item of property, its value, each creditor and the amount owed (T.C.A. 30-4-102 and 30-4-103). Full guide: clearlegaltips.com/tennessee-small-estate-affidavit/

Step 1: The decedent and the timing

Decedent's full legal name: _____

Date of death: _____

Date of death + 45 days (earliest filing date, unless the court waives the wait for good cause): _____

County where the decedent lived at death: _____

☐ No one has filed a petition for a personal representative for this estate

Step 2: List the personal property

List only personal property owned by the decedent that would go through probate. Leave out property held as tenants by the entirety or jointly with right of survivorship, and property payable to a named beneficiary. Real estate can't be included. Attach a second sheet if you need more rows.

Asset (account, stocks, item)	Company / account detail	Value (mark Est. if estimated)

TOTAL of all personal property (must be \$50,000 or less): _____

☐ Total is \$50,000 or less

☐ No real estate is listed

Step 3: List the creditors

Creditor (funeral and burial debts may be included)	Mailing address	Amount owed

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TOTAL owed to creditors: _____

A notice to creditors is not published in a small estate, and creditors can't file claims (30-4-103(6)). Still list every known creditor and the amount owed.

Step 4: Bond or waiver

The bond equals the value of the property being administered. It isn't required when the petitioners are the sole heirs of a person who died without a will, when they are the sole beneficiaries under a will, or when all adult heirs and beneficiaries consent in writing (30-4-103(3)).

- ☐ Petitioners are the sole heirs (no will)
- ☐ Petitioners are the sole beneficiaries (will)
- ☐ Written consent collected from every adult heir and beneficiary (see Step 5)
- ☐ None of the above: a surety bond equal to the property value is needed

Step 5: Bond-waiver consent tracker

Shelby County asks for a consent from every heir. A minor or an incompetent adult signs through a legally authorized representative. Other counties may differ, so ask your clerk which form to use.

Heir / beneficiary	Relationship	Adult? (Y/N)	Consent signed (date)

INSTRUCTIONS FOR USE

Figures and rules checked in October 2026 against T.C.A. 30-4-101 to 30-4-104 and Public Chapter 297 (2023). General information, not legal advice. Court practice varies by county, so confirm forms and fees with the clerk where the decedent lived. Companion guide:
clearlegaltips.com/tennessee-small-estate-affidavit/