

Simple Estate Checklist

Name of Decedent: _____ Envelope Number: _____

- Affidavit (ORS 114.525)
 - No probate filed
 - Notice of duty language directly under case caption (ORS 114.525(1)(a))
 - Statement re: correctional facility 15 years prior to death (ORS 114.525(1)(t))
 - If yes, statement will mail copy to department of corrections
 - Statement re: application/petition for appointment of PR (ORS 114.525(h))
 - Venue (Place of death, domicile, location of property)
 - Name and address of affiant (heir, devisee, creditor, personal representative)
 - Affiant case history/criminal background
 - Statement re: affiant has not been convicted of a felony (ORS 114.525(1)(r) and ORS 114.515(2)(b))
 - Decedent's information (name, age, last four digits of social security number, home or mailing address, date of death, and place of death [ORS 114.525(1)(e)-(f)])
 - Time of Filing (30 days from date of death [ORS 114.515(3)] or ORS 114.505(2)(c) (60 days if creditor)
 - Date of death: _____
 - Decedent's Estate
 - Real Property under \$200,000 (ORS 114.510)
 - Legal description of real property (ORS 114.525(1)(g))
 - Verification of property value/statement of real market value at death
 - Personal Property under \$75,000 (ORS 114.510)
 - Items over \$500 separately itemized
 - Vehicles (year, make, model, and estimate of fair market value)
 - Bank account (bank name, type of account, estimated value)
 - Bond (type and fair market value at death)
 - Stocks (company name, number of shares, and fair market value)
 - Safety Deposit Box (inventory with contents and value [ORS 114.537])
 - Inventory due date (required 30 days after filing)
 - Manufactured home if not real property (year, make, model, location, license plate)
 - Other (e.g., life insurance or pension – clear description)
 - Heirs (name, relationship to decedent, and last known address [ORS 114.525(1)(j)])
 - Distribution surviving spouse and non-joint children (ORS 112.065 and ORS 112.025)
 - Devisees (name and address [ORS 114.525(1)(k)])
 - Heirs and devisees age of majority
 - Statement of notice to heirs by mail (ORS 114.525(1)(j))
 - Statement of notice to devisees by mail (ORS 114.525(1)(k))
 - Distribution (ORS 114.525(1)(L))
 - Statement re: reasonable efforts to ascertain creditors (ORS 114.525(1)(m))
 - Known creditors (name, address, amount owed [ORS 114.525(1)(n)])
 - Disputed claims (name, address, and amount [ORS 114.525(1)(o)])
 - Mailing address for presentment of claim and preferred method of notification (ORS 114.525(1)(p))
 - Notice to creditors (ORS 114.525(1)(n)-(o))
 - Notice to Department of Human Services and Oregon Health Authority (ORS 114.525(1)(s))
 - Statement re: barred claims (ORS 114.525(1)(v))
 - Anticipated administrative expenses and attorney fees (if any) (ORS 114.525(1)(q))
 - Notarized document/witness signature
- Certified Copy of Death Certificate (ORS 114.525(2))
 - If e-filed, death certificate is a separate document (not attached to the affidavit because it must be filed confidentially) – CEDT code automatically makes the document confidential if e-filed.

