

## Simple Estate Checklist

Name of Decedent: \_\_\_\_\_ Envelope Number: \_\_\_\_\_

Clerk Initials and Date:   /  

- \_\_\_\_\_ 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))
      - N/A   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)
    - N/A   Date of death is before **January 1, 2020** ( )
  - \_\_\_\_\_ 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.

\_\_\_\_\_ Testate or Intestate

\_\_\_\_\_ Original Will (ORS 114.525(3))

\_\_\_\_\_ Affidavit of Attesting Witnesses (ORS 114.525(3))

\_\_\_\_\_ Codicils and Affidavit of Attesting Witnesses (ORS 114.525(3))

\_\_\_\_\_ Trust Certification or Trust (ORS 114.525(4))

\_\_\_\_\_ Filing Fee (ORS 114.515(5))

Distribution of Property to Heirs and Devisees					
Name of Heir or Devisee	Relationship to Decedent	Heir	Devisee	<b>Pre/Post</b> Deceased	Additional Information
	Spouse				
	Child				
	Child				
	Child				
	TRUST				