

Small Estate Affidavit Information Checklist

You will need the following information with you when you use this program.

1. The name and address of the person who died (also called “the decedent”).
2. A certified copy of the Death Certificate.
3. The names and addresses of the decedent’s closest living relatives at the time of their death:
 - The names and addresses of the decedent’s husband or wife, children, and grandchildren.
 - If the decedent does not have a husband or wife, children or grandchildren, the names and addresses of the decedent’s parents.
 - If the decedent’s parents are no longer living, the names and addresses of the decedent’s siblings.
 - If the decedent’s siblings are no longer living, then the names and addresses of the siblings’ children (decedent’s nieces and nephews).
 - If none of the above family members of the decedent are living, this program is not for you. Contact the Surrogate’s Court for more information.
4. If the decedent had a Will, the original Will and the names and addresses of the people mentioned in the Will.
5. If the decedent had assets, the value of each asset. You will need account numbers and serial numbers of assets. Assets may include the following:
 - Bank accounts (not joint accounts)
 - Investment accounts
 - Insurance policy with no beneficiary
 - Cars and boats
6. The decedent’s unpaid creditors. This may include the following:
 - Credit card bills
 - Utility bills
 - Funeral expenses