

## SMALL ESTATE AFFIDAVIT CHECKLIST

To qualify for a Small Estate you **MUST** answer YES to the following questions. If you answer **NO** to either question, you will need to apply for a full estate and pick up a packet from the Probate Court.

**Yes or No** The value of the estate is less than \$25,000.00

**Yes or No** I have found that there is no real property (land and/or house) that must be transferred out of the deceased person's name. (Please contact the Probate Court if you have questions about real property)

The Probate Court will need the following documents to complete a Small Estate. You **MUST** submit all required documents together.

\_\_\_\_\_ Death Certificate **(REQUIRED)**

\_\_\_\_\_ Obituary and/or Funeral Program **(REQUIRED)**

\_\_\_\_\_ Paid receipt from the funeral home stating all funeral expenses are paid. It must state there is a \$ 0 balance or expenses are paid in full. **(REQUIRED)**

\_\_\_\_\_ Please list **all next of kin** on the back side of this checklist and turn in the completed checklist with your documentation. The court needs to know: full names, addresses, and relationship to the deceased person. If the names listed on the back of this form do not match the names listed in the obituary and/or funeral program, it may result in a delay of the Small Estate being completed. **(REQUIRED)**

\_\_\_\_\_ Your name, address and relationship to the deceased: **(REQUIRED)**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Relationship to Deceased: \_\_\_\_\_

Phone Number: \_\_\_\_\_

\_\_\_\_\_ A complete name of all banks and/or financial institutions where an account in the deceased person's name needs to be closed and funds disbursed. **(IF NEEDED)**

\_\_\_\_\_ A clear copy of the registrations and/or titles of any vehicles, motorcycles, mobile homes or any other item titled in the deceased person's name. The Department of Motor Vehicles requires the Year, Make, Model and VIN number on the Small Estate Affidavit. Small Estate Affidavits without the required information will not be accepted by the DMV. **(IF NEEDED)**

\_\_\_\_\_ List any other reasons you may need a Small Estate Affidavit. Please be Specific: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Waivers of Personal Property and/or Renunciations of Right to Administration **(May be required depending on the situation. Please contact the court for further information so the court may provide you with the form)**

\_\_\_\_\_ \$25.00 cash/check/money order - the Probate Court **DOES NOT** accept Debit Cards or Credit Cards. If you are paying in cash, please provide exact change. **(REQUIRED)**

It is vital that you provide all of the documentation required above. Failure to provide all necessary information may result in the Affidavit being delayed or all documentation being returned to you without the affidavit being completed.

**Mailing Address:**  
Sumter County Probate Court  
215 North Harvin Street  
Sumter, SC 29150  
Phone Number: 803-436-2166

**List of Heirs/Next of Kin**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Relationship to Deceased: \_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Relationship to Deceased: \_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Relationship to Deceased: \_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Relationship to Deceased: \_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Relationship to Deceased: \_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Relationship to Deceased: \_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Relationship to Deceased: \_\_\_\_\_