
Agnew Law Office, P.C.

A Family Estate Planning Law Firm

SMALL ESTATE AFFIDAVIT INFORMATION SHEET

CONFIDENTIAL
COVERED BY ATTORNEY-CLIENT PRIVILEGE

Decedent's Personal Information

Decedent's Name			
Street			
City		State	
County		Zip Code	
Date of Death			
Location of Death			
Date of Birth			
Social Security Number			

Affiant's Personal Information

Name			
Street			
City		State	
County		Zip Code	
Home Phone		Cell Phone	
E-mail			
Relationship to Decedent			

<i>Asset Information - Assets Owned Solely by Decedent</i>	
Property Description <i>(i.e. Name of Bank, Bank Account #) total must be less than \$100,000</i>	Approximate Value

<i>Vehicle Information</i>			
Make & Model Year	Body Type	License Plate # & Year registered	VIN * Provide copy of vehicle title
Vehicle to be transferred (or sold) to:			
Name		Address	

<i>Claim Information</i>	
Classification of Claim	Name, post office address, and amount
Class 1: funeral and burial expenses, which include reasonable amounts paid for a burial space, crypt, or niche; a marker on the burial space; and care of the burial space, crypt, or niche; expenses of administration; and statutory custodial claims as follows:	
Class 2: the surviving spouse's award or child's award, if applicable, as follows: <i>\$20,000, plus \$10,000 multiplied by the number of minor children and adult dependent children who resided with the surviving spouse at the time of the decedent's death</i>	
Class 3: debts due the United States, as follows:	
Class 4: money due employees of the decedent of not more than \$800 for each claimant for services rendered within 4 months prior to the decedent's death and expenses attending the last illness, as follows:	
Class 5: money and property received or held in trust by the decedent which cannot be identified or traced, as follows:	
Class 6: debts due the State of Illinois and any county, township, city, town, village, or school district located within Illinois, as follows:	

Class 7: all other claims, as follows (i.e. medical, credit card):	
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<i>Awards to be Paid</i>	
Surviving Spouse	
Minor Children	
Adult Dependent Children	

Beneficiary Information

NO Will (intestate = heirs)

Name, Relationship, Address, age of Minor	Portion of Estate

Will (need certified copy from County)

Name, Relationship, Address, age of Minor <i>Will beneficiaries, also include if a trust</i>	Portion of Estate

Distribution Information

Name	Address	Portion of Estate

Documents Needed

- Copy of Death Certificate
- Copy of Revocable Trust if not prepared by Agnew Law Office.
- Copy of the **original** Last Will and Testament