

Small Estate Affidavit for California

Form Instructions:

Complete this form to claim the rights to a decedent's property and to secure payment directly to you for monies held in the decedent's name at the Credit Union, without procuring letters of testamentary or letters of administration and *without awaiting probate of the decedent's estate.

Complete the applicable sections below. **All signatures must be notarized.** Mail the completed and notarized form to NGFCU, Attn: MSC Department, PO Box 47009, Gardena, CA 90247.

Statement and Declaration

The person(s) listed as signer(s) of this document ("Declarants") declare as follows:

1. _____, Decedent, died on the ____ day of _____ 20____, in the County of _____, State of California.
2. At least 40 days have elapsed since Decedent's death, as shown in a certified copy of the decedent's death certificate which is attached to this affidavit or declaration.
3. Select only **one** of the following:
 - ☐ No proceeding is now being or has been conducted in California for administration of the Decedent's estate.
 - ☐ The decedent's personal representative has consented in writing to the payment, transfer, or delivery to the affiant or declarant of the property described in this affidavit or declaration.
4. Select one of the following:
 - ☐ For decedents who passed away on or after April 1, 2025, the current gross fair market value of the decedent's real and personal property in California, excluding the property described in section 13050 of the California Probate Code, does not exceed two hundred eight thousand, eight hundred fifty dollars (\$208,850).
 - ☐ For decedents who passed away on April 1, 2022, through March 31, 2025, the current gross fair market value of the decedent's real and personal property in California, excluding the property described in section 13050 of the California Probate Code, does not exceed one hundred eighty-four thousand, five hundred dollars (\$184,500).
 - ☐ For decedents who passed away before April 1, 2022, the current gross fair market value of the decedent's real and personal property in California, excluding the property described in section 13050 of the California Probate Code, does not exceed one hundred sixty-six thousand, five hundred dollars (\$166,500).
5. At the time of death, Decedent was the sole owner of the following account(s) at NGFCU:

Member Number

Account Number(s)	Account Number(s)	Account Number(s)

All loan payment transfer modifications should be sent to Loan Servicing for processing.



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6. The successor(s) of the decedent, as defined in Probate Code Section 13006, is/are:

Name	Social Security Number (SSN)	Relationship to Decedent, if any

7. Select only **one** of the following:

- ☐ The declarant(s) is/are the successor(s) of the Decedent (as defined in Section 13006 of the California Probate Code) to the Decedent's interest in the described property
- ☐ The declarant(s) is/are authorized under Section 13051 of the California Probate Code to act on behalf of the successor of the Decedent (as defined in Section 13006 of the California Probate Code) with respect to the Decedent's interest in the described property.

8. No other person has a superior right to the interest of the Decedent in the described property.

9. Declarants request that the described property be paid, delivered, or transferred to Declarants.

Signatures

Declarants, individually and collectively, agree to hold the Credit Union harmless from all liability, claims, demands, losses, damages, costs, and expenses, including but not limited to court costs and attorney's fees it may incur by reason of any payment or delivery made of property by said financial institution pursuant to this declaration.

I/We understand that this form has been provided to me/us by the Credit Union for my/our convenience only. I/we further understand and agree that the Credit Union has not undertaken to advise me/us of my/our legal rights and that I/we should consult an attorney or other qualified legal advisor before executing this form.

Declarants make this Declaration pursuant to section 13100 et. seq. of the California Probate Code and for the purpose of securing payment directly to the declarant(s) of monies held by the decedent at Northrop Grumman Federal Credit Union without procuring letters of testamentary or letters of administration and without awaiting probate of the decedent's estate.

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*Declarants affirm under penalty of perjury under the laws of the State of California
that the foregoing is true and correct.*

Declarant's Printed Name	Declarant's Signature	Date

Certificate of Acknowledgment of Notary Public

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document

State of _____

County of _____

On _____ before me, _____ (Insert name and title of the officer)
personally appeared _____, who proved to me on the basis
of satisfactory evidence to be the person(s) whose names(s) is/are subscribed to the within instrument and acknowledged to
me that he/she/ they executed the same in his/her/ their authorized capacity(ies), and that by his/her/their signature(s) on the
instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the state of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature _____

Place Seal Above

