

GENERAL ASSEMBLY OF NORTH CAROLINA  
SESSION 2009

H

1

HOUSE BILL 203

Short Title: Increase Small Estate Amount. (Public)

Sponsors: Representatives Randleman, Hurley, Spear, Faison (Primary Sponsors);  
K. Alexander, Blackwell, Boles, Burr, Daughtry, Dollar, Folwell, Frye,  
Gillespie, Howard, Jackson, Justus, Lucas, McCormick, McLawhorn, Mills,  
Rapp, Sager, Setzer, Stam, Stevens, and Wiley.

Referred to: Judiciary III, if favorable, Finance.

February 18, 2009

A BILL TO BE ENTITLED

AN ACT TO INCREASE THE SIZE OF ESTATES THAT MAY BE ADMINISTERED  
UNDER THE SMALL ESTATES PROVISIONS OF THE GENERAL STATUTES.

The General Assembly of North Carolina enacts:

**SECTION 1.** G.S. 28A-25-1(a) reads as rewritten:

"(a) When a decedent dies intestate leaving personal property, less liens and encumbrances thereon, not exceeding ~~ten thousand dollars (\$10,000)~~ twenty thousand dollars (\$20,000) in value, at any time after 30 days from the date of death, any person indebted to the decedent or having possession of tangible personal property or an instrument evidencing a debt, obligation, stock or chose in action belonging to the decedent shall make payment of the indebtedness or deliver the tangible personal property or an instrument evidencing a debt, obligation, stock or chose in action to a person claiming to be the public administrator appointed pursuant to G.S. 28A-12-1, or an heir or creditor of the decedent, not disqualified under G.S. 28A-4-2, upon being presented a certified copy of an affidavit filed in accordance with subsection (b) and made by or on behalf of the heir or creditor or the public administrator stating:

- (1) The name and address of the affiant and the fact that he or she is the public administrator or an heir or creditor of the decedent;
- (2) The name of the decedent and his residence at time of death;
- (3) The date and place of death of the decedent;
- (4) That 30 days have elapsed since the death of the decedent;
- (5) That the value of all the personal property owned by the estate of the decedent, less liens and encumbrances thereon, does not exceed ~~ten thousand dollars (\$10,000);~~ twenty thousand dollars (\$20,000);
- (6) That no application or petition for appointment of a personal representative is pending or has been granted in any jurisdiction;
- (7) The names and addresses of those persons who are entitled, under the provisions of the Intestate Succession Act, to the personal property of the decedent and their relationship, if any, to the decedent; and
- (8) A description sufficient to identify each tract of real property owned by the decedent at the time of his death.

In those cases in which the affiant is the surviving spouse and sole heir of the decedent, not disqualified under G.S. 28A-4-2, the property described in this subsection that may be collected pursuant to this section may exceed ~~ten thousand dollars (\$10,000)~~ twenty thousand dollars



1 ~~(\$20,000)~~ in value but shall not exceed ~~twenty thousand dollars (\$20,000)~~ thirty thousand  
2 dollars (\$30,000) in value. In such cases, the affidavit shall state: (i) the name and address of  
3 the affiant and the fact that he or she is the surviving spouse and is entitled, under the  
4 provisions of the Intestate Succession Act, to all of the property of the decedent; (ii) that the  
5 value of all of the personal property owned by the estate of the decedent, less liens and  
6 encumbrances thereon, does not exceed ~~twenty thousand dollars (\$20,000)~~; thirty thousand  
7 dollars (\$30,000); and (iii) the information required under subdivisions (2), (3), (4), (6), and (8)  
8 of this subsection."

9 **SECTION 2.** G.S. 28A-25-1.1(a) reads as rewritten:

10 "(a) When a decedent dies testate leaving personal property, less liens and encumbrances  
11 thereon, not exceeding ~~ten thousand dollars (\$10,000)~~ twenty thousand dollars (\$20,000) in  
12 value, at any time after 30 days from the date of death, any person indebted to the decedent or  
13 having possession of tangible personal property or an instrument evidencing a debt, obligation,  
14 stock or chose in action belonging to the decedent shall make payment of the indebtedness or  
15 deliver the tangible personal property or an instrument evidencing a debt, obligation, stock or  
16 chose in action to a person claiming to be the public administrator appointed pursuant to  
17 G.S. 28A-12-1, a person named or designated as executor in the will, devisee, heir or creditor,  
18 of the decedent, not disqualified under G.S. 28A-4-2, upon being presented a certified copy of  
19 an affidavit filed in accordance with subsection (b) and made by or on behalf of the heir, the  
20 person named or designated as executor in the will of the decedent, the creditor, the public  
21 administrator, or the devisee, stating:

- 22 (1) The name and address of the affiant and the fact that he is the public  
23 administrator, a person named or designated as executor in the will, devisee,  
24 heir or creditor, of the decedent;
- 25 (2) The name of the decedent and his residence at time of death;
- 26 (3) The date and place of death of the decedent;
- 27 (4) That 30 days have elapsed since the death of the decedent;
- 28 (5) That the decedent died testate leaving personal property, less liens and  
29 encumbrances thereon, not exceeding ~~ten thousand dollars (\$10,000)~~ twenty  
30 thousand dollars (\$20,000) in value;
- 31 (6) That the decedent's will has been admitted to probate in the court of the  
32 proper county and a duly certified copy of the will has been recorded in each  
33 county in which is located any real property owned by the decedent at the  
34 time of his death;
- 35 (7) That a certified copy of the decedent's will is attached to the affidavit;
- 36 (8) That no application or petition for appointment of a personal representative  
37 is pending or has been granted in any jurisdiction;
- 38 (9) The names and addresses of those persons who are entitled, under the  
39 provisions of the will, or if applicable, of the Intestate Succession Act, to the  
40 property of the decedent; and their relationship, if any, to the decedent; and  
41 (10) A description sufficient to identify each tract of real property owned by the  
42 decedent at the time of his death.

43 In those cases in which the affiant is the surviving spouse, is entitled to all of the property  
44 of the decedent, and is not disqualified under G.S. 28A-4-2, the property described in this  
45 subsection that may be collected pursuant to this section may exceed ~~ten thousand dollars~~  
46 ~~(\$10,000)~~ twenty thousand dollars (\$20,000) in value but shall not exceed ~~twenty thousand~~  
47 ~~dollars (\$20,000)~~ thirty thousand dollars (\$30,000) in value. In such cases, the affidavit shall  
48 state: (i) the name and address of the affiant and the fact that he or she is the surviving spouse  
49 and is entitled, under the provisions of the decedent's will, or if applicable, of the Intestate  
50 Succession Act, to all of the property of the decedent; (ii) that the decedent died testate leaving  
51 personal property, less liens and encumbrances thereon, not exceeding ~~twenty thousand dollars~~

1 (~~\$20,000~~); thirty thousand dollars (\$30,000); and (iii) the information required under  
2 subdivisions (2), (3), (4), (6), (7), (8), and (10) of this subsection."

3           **SECTION 3.** This act becomes effective October 1, 2009, and applies to estates of  
4 persons dying on or after that date.