

SURROGATE'S COURT: STATE OF NEW YORK  
COUNTY OF CORTLAND

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In the Matter of the Closing of the Estate

of

AFFIDAVIT BY FIDUCIARY

File No.

\_\_\_\_\_, Deceased

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STATE OF NEW YORK: ss:  
COUNTY OF CORTLAND:

\_\_\_\_\_, being duly sworn, deposes and says:

1. I am the  executor  administrator of the above-captioned estate.
2. I am familiar with the facts and circumstances concerning the administration of the above estate.
3. Letters Testamentary/Administration were issued to me on \_\_\_\_\_.
4. More than 7 months have passed since the issuance of Letters (see SCPA §1802); (if less than 7 months, explain).
5. An Inventory of Assets form has been filed pursuant to Uniform Rule 207.20 and all filing fees have been paid.
6. An investigation has been made into all taxable transfers made by the deceased and the value of all assets in which the deceased had an interest. [check appropriate statement below]  
 An estate tax return or returns were filed, all taxes assessed were paid and a tax receipt or discharge from liability letters is on file with the court.  
 No estate tax return (state or federal) was filed. The value of the gross estate is less than the applicable thresholds for filing such tax returns.
7. All debts, claims, funeral and administration expenses have been paid and a final distribution of all estate assets has been made to the person or parties entitled thereto.
8. Receipts from all non-residuary legatees and releases from all residuary legatees, distributees (in cases of intestacy) and all other interested persons have been filed or are filed herewith.
9. To my knowledge all matters involving the estate have been completed.

10. I understand that closing the estate in this manner will NOT result in a decree from the court, however, the estate will be closed based on these filings. If additional estate assets are discovered in the future, I will contact the court to open the estate and administer the assets.

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Signature of Fiduciary

Sworn to before me this \_\_\_\_\_ day  
of \_\_\_\_\_, 20\_\_.

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Notary Public