

# Affidavit / Declaration for the Collection of Decedent's Account(s)

<b>Member Name</b>	<b>Member Number</b>	<b>Suffix</b>	<b>Date</b>

I \_\_\_\_\_ being duly sworn (if each affiant / declarant disposes himself / herself and not for the other and all references to the singular includes the plural),

1. That \_\_\_\_\_ died in the City of \_\_\_\_\_
2. County of \_\_\_\_\_ State of \_\_\_\_\_, on the \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.  
[On or after April 1, 2025]
3. At least **40 days** have elapsed since the date of death as shown in the certified copy of the Death Certificate that I/we have attached.  
(A CERTIFIED COPY of the death certificate **must be attached**).
4. No proceeding is now being or has been conducted in the State of California for the administration of the decedent's Estate.
5. The gross 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 (\$208,850.00).
6. At the time of death, said decedent was the owner of certain property held by Patelco Credit Union based in the city of Dublin, California, and described as follows:

7. The name(s) of the successor(s) of the decedent (as defined in Section 13006 of the California Probate Code) to the described property are:

8. That affiant / declarant is an adult, legally competent in all respects, and:
- ☐ The affiant or declarant is the successor of the decedent as defined in Section 13006 of the California Probate Code and has all legal interest in the property described in Section 5 above.
- ☐ The affiant or declarant is 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 in Section 5 above.
9. No other person(s) has a superior right to the interest of the decedent in the described property.

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10. The affiant or declarant requests that the described property be paid, delivered, or transferred to him / her at the address listed below. In consideration of such payment, delivery, or transfer, the undersigned hereby jointly and severally agrees to hold Patelco Credit Union harmless against any and all liabilities, loss, cost(s), or expenses to which it may put or which it may incur by reason thereof, including attorney's fees. My address is as follows:

Address, City, State, Zip
Phone

The affiant or declarant affirms or declares under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Signature 1	Date	Signature 2	Date

### California All-Purpose Acknowledgement

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.

## Acknowledgement

State of California

County of \_\_\_\_\_

On \_\_\_\_\_ before me, \_\_\_\_\_ personally appeared \_\_\_\_\_, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in 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.

(Seal)

Notary Signature \_\_\_\_\_

Commission Expires \_\_\_\_\_