

CALIFORNIA PROBATE UPDATE



TAKING TITLE TO A NEW LEVEL IN CALIFORNIA

CALIFORNIA PROBATE UPDATE – APRIL 1, 2025

Important Changes for Heirs and Homeowners

California has enacted **Assembly Bill 2016 (AB 2016)**, significantly modernizing how small estates and family homes are handled after a person passes away. These changes are designed to simplify and speed up the process of passing property to heirs—especially primary residences.

Key Changes Effective April 1, 2025



Exclusion of Primary Residence from Estate Value Limits

- A decedent's **primary residence** (valued up to \$750,000) is now **excluded** when determining whether an estate qualifies as a "small estate."
- More families can now avoid formal probate.



Increased Small Estate Value Cap

- The **total estate value limit** for using simplified probate procedures is now **\$934,500**.
 - Up to **\$750,000** may be for the primary residence
 - Up to **\$184,500** for other assets



Easier Transfer of Homes Under \$750,000

- If the home was the decedent's primary residence and is worth **under \$750,000**, heirs can now file a simplified **Petition to Determine Succession to Real Property**.
- This bypasses the full probate process and reduces time and legal fees.

What This Means for You

- ✓ **Faster property transfers** to heirs
- ✓ **Lower legal and court costs**
- ✓ **Avoid the long delays of formal probate**
- ✓ **Better estate planning tools** for families and real estate investors