

635.7 Report and inventory — value and conversion.

1. The personal representative is required to file the report and inventory for which provision is made in [section 633.361](#), including all probate and nonprobate assets. [This chapter](#) does not exempt the personal representative from complying with the requirements of [section 422.27](#), [633.480](#), or [633.481](#), and the administration of an estate whether converted to or from a small estate shall be considered one proceeding pursuant to [section 633.330](#). For a death occurring before January 1, 2025, [this chapter](#) does not exempt the personal representative from complying with the requirements of [section 450.22](#) or [450.58](#).

2. The report and inventory shall separately specify which assets are probate assets subject to the jurisdiction of this state and clearly state their gross value and the sum thereof.

3. If the gross value of probate assets subject to the jurisdiction of this state exceeds the amount permitted for a small estate under [section 635.1](#), the estate shall be administered as provided in [chapter 633](#).

4. If the report and inventory in an estate administered pursuant to [chapter 633](#) separately specifies the gross value of the probate assets subject to the jurisdiction of this state does not exceed the amount permitted under [section 635.1](#), the estate shall be administered as a small estate upon the filing of a statement by the personal representative that the estate is a small estate.

5. If the personal representative files a report to convert the estate administration to or from a small estate based on the gross value of probate assets subject to the jurisdiction of this state, the clerk shall make the conversion without an order of the court.

6. Other interested parties may apply to convert proceedings from a small estate to a regular estate or from a regular estate to a small estate which the court may grant only upon good cause shown.

[C75, 77, 79, 81, §635.7; 81 Acts, ch 199, §8]

89 Acts, ch 25, §3; 2003 Acts, ch 151, §57; 2004 Acts, ch 1120, §8; 2007 Acts, ch 134, §23, 28; 2012 Acts, ch 1123, §30; 2018 Acts, ch 1140, §4, 6, 9; 2025 Acts, ch 148, §50, 53, 54

2025 amendment to subsection 1 applies retroactively to January 1, 2025, to the estates of decedents dying on or after January 1, 2025; 2025 Acts, ch 148, §54

Subsection 1 amended