

IN THE CIRCUIT COURT FOR THE 14th JUDICIAL CIRCUIT

PROBATE DIVISION

CHECKLIST FOR CLOSING FORMAL ADMINISTRATION ESTATE rvd 1/2024

ESTATE OF: _____ Case No. _____ Date of Death: _____

Attorney of Record: _____ Phone: _____

TYPE OF ESTATE: Testate: Intestate: Ancillary:

		YES	NO
1.	All Required Notice to Creditors and Interested Parties Given?		
	Notice of Administration served as required by R.5.240 and/or waivers ____ & proofs filed ____?		
	Notice to Creditors served _____ on DOR _____ on AHCA <i>age 55+</i> _____ F.S. 733.2121?		
	Proof of publication of Notice of Creditors filed. R.5.241? or claims barred ____?		
	Verified diligent search Statement Regarding Creditors filed. R.5.241 ____? or claims barred ____?		
2.	Verified Inventory filed as required by F.S. 733.604?		
	All proofs of service of inventory filed as required by R. 5.340 ?		
3.	Creditors		
	Estate is NOT indebted ____ Claims are barred ____		
	All filed claims satisfied ____ or settled ____? F.S. 733.705 If not, attach explanation		
4..	Taxes		
	Notice of Federal Tax Return filed and served? ____ R. 5.395 Tax Return due date is ____?		
	Federal Estate Tax Closing Letter filed?		
5	Civil Actions and Adversary Proceedings		
	Any adversary proceedings filed R.5.025? ____ If yes, have proceedings been disposed? ____		
	Any Notice of Civil Actions filed R.5.065? ____ If yes, have proceedings been disposed? ____		
6.	Final Accounting		
	Final Accounting filed? ____ or R.5.180 waivers by ALL interested persons filed? ____		
	Any objections to final accounting filed? ____ All objections resolved? ____		
	Final Accounting served on ALL interested persons ____ or R.5.180(b) waivers filed ____		

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PAGE 2 Cont.- CHECKLIST FOR CLOSING FORMAL ADMINISTRATION ESTATE rvd 4/2019

		YES	NO
7.	Petition for Discharge complying with R.5.400 filed?		
	Has petition for discharge been signed by the Personal Rep. Rule 5.330?		
	Has notice of petition been given to beneficiaries (___) and creditors(____) or consents filed? (___)		
	Has the time period expired for filing objections to the discharge?		
	Are there any unresolved objections to the petition for discharge?		
	Name of Interested Persons served with Petition to Discharge:		
	1. _____ Waiver () Date Served ()		
	2. _____ Waiver () Date Served ()		
	3. _____ Waiver () Date Served ()		
	4. _____ Waiver () Date Served ()		
	5. _____ Waiver () Date Served ()		
	6. _____ Waiver () Date Served ()		
	7. _____ Waiver () Date Served ()		
8.	Plan of Distribution complying with R.5.400(b) filed?		
	Proof of distribution filed as required by R. 5.400(e) ____ ? or R.5.180(b) waivers filed ____ ?		
9.	Beneficiaries/Heirs		
	Receipts ____ or R. 5.180(b) waivers filed from all beneficiaries/heirs ____		
10.	Compensation Fees Paid		
	Petition to discharge shows compensation paid to attorneys, accountants, personal representative and others employed by the PR and the manner of determining compensation R. 5.400(b) ____?		
11.	Miscellaneous		
	Petition to Determine Exempt Property filed? F.S. 732.402		
	Petition to Determine Homestead filed? R.5.405		
	Affidavit of Heirs for intestate cases filed?		
	Checked with the Department of Unclaimed Property?		
	Death certificate of any beneficiaries filed?		
12.	Proposed Orders to be entered by the Judge efiled through the Eportal		
	Order of Discharge _____ Other _____		
	Order Determining Homestead _____ Other _____		

I certify that I have personally reviewed the foregoing checklist and it is accurate.

Attorney for Petitioner _____ **Date** _____

Mailing Address _____