

IN THE CIRCUIT COURT FOR THE 14th JUDICIAL CIRCUIT

PROBATE DIVISION

CHECKLIST FOR SUMMARY ADMINISTRATION ESTATE rvd 7/2024

ESTATE OF: _____ Attorney of Record _____ CASE NO: _____

Date of Death: _____ Testate (____) Intestate (____) Ancillary (____)

		YES	NO
1.	<i>Certified Death Certificate Filed?</i>		
2.	<i>Last Will and Testament</i>		
	Original Will filed? (or authenticated copy for ancillary)- Rule 5.200		
	If a copy is filed, a petition to establish lost will complying with F.S. 733.207 and Rule 5.510 & 5.025 has been filed?		
	Will is self proved (F.S. 732.503, 733.201) ?		
	If not self proved, an oath of witness is filed (733.201(2)) ?		
3.	<i>Petition for Summary Administration</i>		
	Verified petition complies with F.S. 735.201, Rule 5.530 and 5.020(e)?		
	All assets and their values are listed in the petition - Rule 5.530(a) ?		
	Non Exempt Assets less than \$75,000 ____ or Deceased 2 years or more ____		
	Proposed distribution of assets included 5.530(12)?		
	Petition signed by spouse ____ beneficiaries ____ or consents ____		
4.	<i>Creditors</i>		
	Estate is NOT indebtedt _____ Claims are barred _____		
	Diligent search and Inquiry for creditors Affidavit filed- F.S. 735.206(2)?		
	Notice given to Agency for Health Care Administration age 55+ F.S. 733.2121?		
	Provision for payment of creditors made to extent of assets?		
5.	<i>Required Notice has been given to all interested persons?</i>		
6.	<i>An Affidavit of Heirs has been filed if intestate case?</i>		
7.	<i>Verified Petition to Determine Homestead filed?</i>		

Proposed Orders to be entered by the Judge efiled through the Eportal
 Order Admitting Will _____ Order of Summary Administration _____
 Order Determining Homestead _____ Other _____

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

Attorney for Petitioner _____ **Date** _____

Mailing Address _____