

**IN THE CIRCUIT COURT FOR THE 14th JUDICIAL CIRCUIT**

PROBATE DIVISION

**CHECKLIST FOR SUMMARY ADMINISTRATION ESTATE** rvd 4/2019

ESTATE OF: \_\_\_\_\_ Attorney of Record \_\_\_\_\_ CASE NO: \_\_\_\_\_

Date of Death: \_\_\_\_\_ Testate (\_\_\_\_) Intestate (\_\_\_\_) Ancillary (\_\_\_\_)

		YES	NO
<b>1.</b>	<b><i>Certified Death Certificate Filed?</i></b>		
<b>2.</b>	<b><i>Last Will and Testament</i></b>		
	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)) ?		
<b>3.</b>	<b><i>Petition for Summary Administration</i></b>		
	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 ____		
<b>4.</b>	<b><i>Creditors</i></b>		
	Estate is NOT indebtedt ____ Claims are barred ____		
	Diligent search and Inquiry for creditors done- 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?		
	Affidavit of no FL tax due filed ____ or Non taxable certificate filed ____?		
<b>5.</b>	<b><i>Required Notice has been given to all interested persons?</i></b>		
<b>6.</b>	<b><i>An Affidavit of Heirs has been filed if intestate case?</i></b>		
<b>7.</b>	<b><i>Verified Petition to Determine Homestead filed?</i></b>		

**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 \_\_\_\_\_