

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

PROBATE DIVISION

**CHECKLIST FOR CLOSING FORMAL ADMINISTRATION ESTATE** rvd 1/2016

ESTATE OF: \_\_\_\_\_ Case No. \_\_\_\_\_ Date of Death: \_\_\_\_\_

Attorney of Record: \_\_\_\_\_ Phone: \_\_\_\_\_

**TYPE OF ESTATE:**    Testate:                       Intestate:                       Ancillary:

		YES	NO
<b>1.</b>	<b>All Required Notice to Creditors and Interested Parties Given?</b>		
	Notice of Administration served as required by R.5.240 and/or waivers ____ & proofs filed ____?		
	Notice to Creditors served _____ on DOR _____ on AHCA age 55+ _____ 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 ____?		
<b>2.</b>	<b>Verified Inventory filed as required by F.S. 733.604?</b>		
	All proofs of service of inventory filed as required by R. 5.340 ?		
<b>3.</b>	<b>Creditors</b>		
	Estate is NOT indebted ____ Claims are barred _____		
	All filed claims satisfied ____ or settled ____? F.S. 733.705 If not, attach explanation		
<b>4..</b>	<b>Taxes</b>		
	Affidavit of no FL tax due filed ____ F.S.198.32? Non taxable certificate filed ____ F.S. 198.26?		
	Notice of Federal Tax Return filed and served? ____ R. 5.395 Tax Return due date is ____?		
	Federal Estate Tax Closing Letter filed?		
<b>5</b>	<b>Civil Actions and Adversary Proceedings</b>		
	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? ____		
<b>6.</b>	<b>Final Accounting</b>		
	Final Accounting filed? ____ or R.5.180 waivers by <b>ALL</b> 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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		YES	NO
<b>7.</b>	<b>Petition for Discharge complying with R.5.400 filed?</b>		
	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?		
	<b>Name of Interested Persons served with Petition to Discharge:</b>		
	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 ( )		
<b>8.</b>	<b>Plan of Distribution complying with R.5.400(b) filed?</b>		
	Proof of distribution filed as required by R. 5.400(e) ____ ? or R.5.180(b) waivers filed ____ ?		
<b>9.</b>	<b>Beneficiaries/Heirs</b>		
	Receipts ____ or R. 5.180(b) waivers filed from all beneficiaries/heirs ____		
<b>10.</b>	<b>Compensation Fees Paid</b>		
	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) ____ ?		
<b>11.</b>	<b>Miscellaneous</b>		
	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?		
<b>12.</b>	<b>Proposed Orders to be entered by the Judge emailed or mailed to Judge's Office?</b>		
	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 \_\_\_\_\_