PROBATE CHECKLISTS

The Court uses the attached probate checklists as a tool to determine whether a petition contains the information required by Florida Statutes and the Florida Probate Rules. These checklists are made available to attorneys and litigants merely as a guide, and should not be relied upon as an exhaustive list of the statutes and rules that may apply to your case. The checklists are not required to be filed with the Court.

To avoid delays, proposed orders should not be e-filed until the petitioner believes that all required accompanying documents have been filed.

If any of the required documents or information is missing, incomplete, or inaccurate, you will be notified. Please ensure that all noted deficiencies are promptly rectified to avoid further delay.

If you intend to dispute any aspect of the Court's order requiring correction of deficiencies, please set your case for hearing. Neither the Clerk's Office nor the Judicial Assistant can offer legal advice.

IN RE: Estate of		Case No: Division: 48	CP	000
<u>FOR</u>	EIGN WILL: ADMISSION	TO RECORD – F.S. 734	<u>.104</u>	
In compliance with FL Statues 7	734.104 petition details:			
Petitioner's – () Name & Address () Statement of interest () Name & office address of atty () Sworn to & signed by petitioner	Decedent's – () Name & address () Social Security Number () Date of Death () Place of Death () State & County of domicile	 () More than 2 yrs has since decedent's deat that the domiciliary eclosed. () Will is executed as reby chapter 732 FL Procode. () No proceeding has be to administer the decestate in the state of the since t	ch.; or estate is equired robate been filed tedent's	Attorney's – () Name & address () FL Bar number () Phone number () Signed by atty
Accompanying Auther	nticated Copies –	Death Certific	cate – Rul	e 5.205(a)(7)
() Domiciliary petition or Affidavit() Foreign Will & any Codicils() Order that admitted the Will to 1	-	() Death certificate is file () Death certificate is no		e notes below.
<u>Order</u>	=			
() Order Admitting Will or Copies	to Record is provided.			
* If Domiciliary petition is not inc Order Admitting Will (or Cop. petition is required in the juris probate."	ies) must recite, " no			
NOTES:				

Probate Clerk

IN RE: Estate of	Case	e No: CP 000
	Divi	sion: 48
	TESTATE FORMAL ADMINISTRA n FL Probate Rule 5.200 Petition for A	
Petitioner's: Rule 5.200(a)	Decedent: Rule 5.200 (b)	Death Certificate, if filed: Rule 5.205
□Name & Address □Name & office address of Atty. □Sworn to & signed by petitioner	□Name & Address □Date of Death □Place of Death □Last 4 digits of SS# □State & County of domicile	Does the name on the death certificate match what is written in the case style?
Beneficiaries/Heirs at Law: Rule 5.200(c)	
☐Beneficiaries/Heirs name, address, and r☐Year of birth for Minor beneficiary/heir	•	
Intestate - Other Information Required	in Petition by Rule 5.200	
☐ Clarify the estate is filed intestate		
☐ State that after exercise of reasonable dili	gence they are unaware of any unrevo	oked Wills or Codicils, or
☐ If there is one why it is not being offered	for probate	
□ Are consents to the Appointment of the Bond – Are waivers to Bond from all heirs □ YES □ NO □ N/A [So		ajority of the heirs?
, ,	• •	
Additional Information Required by Ru		
Petition is a verified (sworn to) and sign	ed by petitioner	
Statement showing venue		
State approximate value & nature of asse		
☐ State whether probate proceedings are po	ending elsewhere	
Required Information Regarding Person	-	• • • • • • • • • • • • • • • • • • • •
Contain the name and address of P.R. an	, ,	e under FL law
☐ State priority of person/business seeking		
☐Whether there is any other person of equ	~ .	
	on(s) and a statement regarding wheth	ner that person will be served with formal
notice (Rule 5.200(k)).		
Name(s):		
☐Statement if the Personal Representative	is a:	
☐Individual or ☐Business		
*if the P.R. is an individual:		
☐State whether they have been convicted of	of a felony	
☐State whether the person is 18 years of as	ge or older	
☐State whether the person has been convi-	cted in any state or foreign jurisdiction	n of abuse, neglect, or exploitation of an
elderly person or a disabled adult, as those		
\square State whether the person is mentally and	physically able to perform duties	
☐ State if the person is a resident of Florida	and, if not, provide the relationship	to the decedent.

Required information Regarding Oath of Personal Representative: Rule 5.520 - Effective 1/1/2020
☐ Is qualified to serve within provisions of sections 733.302, 733.303, and 733.304
☐ State that the person has reviewed the statutes and understand the qualification of being the PR
☐ State whether they have been convicted of a felony
☐ State whether the person is 18 years of age or older
☐ State whether the person has been convicted in any state or foreign jurisdiction of abuse, neglect, or exploitation of an
elderly person or a disabled adult, as those terms are defined in section F.S. 825.101
☐ State whether the person is mentally and physically able to perform duties
☐ State if the person is a resident of Florida and, if not, provide the relationship to the decedent.
□Will faithfully administer the estate
□ Provide the PR's place of residence and mailing address (if different)
State that they will promptly file and serve notice on all interested persons any time I know that I would not be qualified to
serve as PR with the reason and date the event occurred.
☐ State that if the PR changes their address, they will serve notice on all interested persons within 20 days
Designate a resident agent w/signed acceptance by agent
Letters of Administration
☐ Does the proposed Letters of Administration name the correct person as PR?
Notes:
I hereby certify that I have personally reviewed the documents filed in this matter and that the foregoing check sheet is
accurate.
accurate.
By:
Attorney of Record Clerk Staff

IN RE: Estate of			e No: CP 000	
		Divi	ision: 48	
PROBATE LOST WILL - FORMA	AL ADMINIST	TRATION (F.S. 733.20	02; F.S. 733.207 & Rules 5.200, 5.510 & 5.0	<u>25)</u>
Petitioner's Info: Rule 5.200(a) □Name & Address □Name & office address of Atty. □Sworn to & signed by petitioner	□Name & Ac □Date of Dec □State & Cou		Death Certificate, if filed Rule 5.205 Does the name on the death certificate match what is written in the case style and Last Will & Testament? □YES □NO	
Beneficiaries/Heirs at Law: Rule 5.20 □ Beneficiaries in Will, Codicil, & Separa □ Beneficiaries/Heirs relationship to dec □ Year of birth for Minor beneficiary/he □ N/A □ YES	nte Writing cedent	☐ Petition is a verifie ☐ Statement showing☐ State approximate	tion Required by Rule or Statute ed (sworn to) and signed by petitioner g venue value & nature of assets pate proceedings are pending elsewhere	
Last Will and Testament: Rule 5.200 ☐ Identify the Will & Codicils presented ☐ State petitioner is unaware of any other Wills or Codicils		attached		
Required Information Regarding Person Contain the name and address of P.R. State priority of person/business seeking Whether there is any other person of experiments of the person of the person (Rule 5.200(k)). Name(s):	and state that the sing to be P.R. equal or higher p	ney are qualified to serve preference to appointme	e under FL law	tice
□Statement if the Personal Representati □Individual or □Business *if the P.R. is an individual: □State whether the person has elderly person or a disabled adul □State whether they have been □State whether the person is 18 □State whether the person is m □State if the person is a residen	been convicted t, as those terms convicted of a f 3 years of age or entally and phys	s are defined in section F elony older sically able to perform du	uties	of an
Notice □ Formal notice is given to each person □ Consents from all intestate heirs filed □ Proof of Service of formal notice filed □ Time allowed via formal notice has run		erit if the Will is not estal	ıblished; or	

Required Information Regarding Oath of Personal Representa		<u>1/1/2020</u>
☐ Is qualified to serve within provisions of sections 733.302, 733.302		
State that the person has reviewed the statutes and understand the	e qualification of being the PF	(
State whether they have been convicted of a felony		
State whether the person is 18 years of age or older		
☐State whether the person has been convicted in any state or foreign person or a disabled adult, as those terms are defined in section F.S.		ct, or exploitation of an elderly
\square State if the person is a resident of Florida and, if not, provide the	relationship to the decedent.	
☐Will faithfully administer the estate		
□Provide the PR's place of residence and mailing address (if differe	nt)	
☐State that they will promptly file and serve notice on all interested not be qualified to serve as PR with the reason and date the event of		t I would
☐State that if the PR changes their address, they will serve notice or	n all interested persons within	20 days
☐ Designate a resident agent w/signed acceptance by agent.		
Order Establishing Lost Will & Bond		
Has a copy of the Will attached or the Will is restated	☐ YES	□NO
Bond is Waived in Will; or	□ YES	□NO
 Bond is Waived by all beneficiaries or heirs 	\square YES	\square NO
*One witness when carbon or photocopy showing testator's original signature. Tu attached.	vo witnesses are required when a re	typed or conformed copy of Will is
I hereby certify that I have personally reviewed the documents filed	in this matter and that the fo	oregoing check sheet is accurate.
R_{v}	R_{yy}	
By: Attorney of Record	By: Probate Clerk	
	Trobute Offin	

IN RE: Estate of		Case No: Division: 48	CP 000
TEST	ATE FORMAL ADMINISTRATI	ON – F.S. 732,	<u>733</u>
Petitioner's Info: Rule 5.200(a) □Name & Address □Name & office address of Attorney □Sworn to & signed by petitioner	Decedent Info: Rule 5.200 (b) □ Name & Address □ Date of Death □ State & County of domicile □ Last 4 digits of Soc. Sec. number	Does the match wh and Last	ertificate, if filed Rule 5.205 name on the death certificate nat is written in the case style Will & Testament?
Beneficiaries/Heirs at Law: Rule 5.2 □ Beneficiaries in Will, Codicil, & Separ □ Beneficiaries/Heirs relationship to de □ Year of birth for Minor beneficiary/h □ N/A □ YES	ate Writing cedent		
Last Will and Testament: Rule 5.200 ☐ Identify the Will & Codicils presented ☐ State petitioner is unaware of any othe ☐ State the original Will (or authenticate) ☐ Will is Self-Proving ☐ Pro	er Wills or Codicils ed copy) is in possession of the court	or accompanies : □Proof Will, F.S	-
Required Information Regarding Per Contain the name and address of P.R State priority of person/business seek Whether there is any other person of If yes, the name(s) of that per (Rule 5.200(k)). Name(s):	and state that they are qualified to so ing to be P.R.	erve under FL lav	w
□Statement if the Personal Representat □Individual or □Business *if the P.R. is an individual: □State whether the person has been coperson or a disabled adult, as those term □State whether they have been convicted □State whether the person is 18 years of □State whether the person is mentally at □State if the person is a resident of Florest	nvicted in any state or foreign jurisdicts are defined in section F.S. 825.101 and of a felony of age or older and physically able to perform duties		
Additional Information Required by Petition is a verified (sworn to) and s Statement showing venue State approximate value & nature of a State whether probate proceedings are	igned by petitioner		

Required information Regarding Oath of Personal Representative: Rule		<u>1/1/2020</u>
☐ Is qualified to serve within provisions of sections 733.302, 733.303, and 733.		
☐ State that the person has reviewed the statutes and understand the qualification	ion of being the PI	8
☐ State whether the person is 18 years of age or older		
☐State whether they have been convicted of a felony		
☐ State whether the person has been convicted in any state or foreign jurisdictive person or a disabled adult, as those terms are defined in section F.S. 825.101	ion of abuse, negle	ct, or exploitation of an elderly
☐State whether the person is mentally and physically able to perform duties		
☐State if the person is a resident of Florida and, if not, provide the relationshi	p to the decedent.	
☐Will faithfully administer the estate	1	
□Provide the PR's place of residence and mailing address (if different)		
State that they will promptly file and serve notice on all interested persons are not be qualified to serve as PR with the reason and date the event occurred.	ny time I know tha	t I would
☐State that if the PR changes their address, they will serve notice on all interes	sted persons within	20 days
Designate a resident agent w/signed acceptance by agent.	P	
Order Admitting Will & Appointment of Personal Representative		
Does the Order Admitting Last Will contain the correct date on Will Does the Order Admitting Last Will contain the correct date on Will Does the Order Admitting Last Will contain the correct date on Will	☐ YES	□NO
• Does the proposed Letters of Admin have the correct PR listed?	☐ YES	□NO
 Is Bond waived in the Will or by all interested parties? 	\square YES	\square NO
I hereby certify that I have personally reviewed the documents filed in this mate	ter and that the foreş	going check sheet is accurate.
By:		
Attorney of Record Clo	erk Staff	

IN RE: Estate of	Case No:	CP 000	
	Division: 48		
ANCILLARY ADMINISTRATION – APPOINTIN			E (TESTATE &
<u>INTESTATE)</u> F.S. 733.202 & 734.10	02 and FL Probate Rul	es 5.200 & 5.470	
Petitioner's Info: Rule 5.200(a)	Decedent Info: Ru	ıle 5.200 (b)	
□Name & Address	□Name & Address	, ,	
□Name & Office Address of Attorney	☐Date of Death		
☐Sworn to & Signed by Petitioner(s)	☐State & County of	of domicile	
	□Last 4 digits of Se	ocial Security Nur	mber
Heirs & Beneficiaries and Marital Status: Rule 5.200 (c)	Other Information	required by Sta	tute or Rule
☐Beneficiaries listed in the Will (if Testate) & heirs at law	☐Statement to sho	-	
☐ Address for Beneficiaries & Heirs	☐State the approxi	mate value & natu	are of assets
☐State their relationship	☐State whether pro	obate proceedings	are pending elsewhere
	☐Provide birth yea	r for Minors \square	N/A □ YES □NO
Rule 5.470 – Authenticated Copies from Domiciliary Estate documented by affidavit or certificate)	(If a petition is not rec	quired in the domi	ciliary estate this must be
Testate : Petition of Dom. Proceeding, Will, Order Admitting W	fill & authority of PR	□YES	□NO
Intestate: Petition & authority of PR	in & authority of 1 K	□YES	□NO
Is a Death Certificate for the decedent filed?		□YES	□NO
If appointment of someone other than the domiciliary personal in	representative is reques		
grounds on which appointment is sought (Rule 5.470(3))	$\square N/A$	□YES	□NO
Does the name on the death certificate match what is written in	the case style	\square YES	\square NO
Required Information Regarding Personal Representative -		•	n the petition)
Contain the name and address of P.R. and state that they are of	qualified to serve under	FL law	
State priority of person/business seeking to be P.R.	as to appointment		
□ Whether there is any other person of equal or higher preferen □ If yes, the name(s) of that person(s) and a statement (Rule 5.200(k)).	* *	person will be se	rved with formal notice
☐Statement if the Personal Representative is a:			
□Individual or □Business			
*if the Personal Representative is an individual:			
☐State whether the person is 18 years of age or older			
☐State whether they have been convicted of a felony			
☐ State whether the person has been convicted in any state or for person or a disabled adult, as those terms are defined in section.	<i>O</i> ,	use, neglect, or ex	exploitation of an elderly
$\square \\$ State whether the person is mentally and physically able to per	rform duties		
\square State if the person is a resident of Florida and, if not, provide	the relationship to the	decedent.	

Required Information Regarding Oath of Personal Represe	entative 5.320 - Effective 1/1/	<u>2020</u>
☐ Is qualified to serve within provisions of sections 733.302, 73.	3.303, and 733.304	
☐State that the person has reviewed the statutes and understand	d the qualification of being the l	PR
☐State whether the person is 18 years of age or older		
☐ State whether they have been convicted of a felony		
☐State whether the person has been convicted in any state or fo	oreign jurisdiction of abuse, neg	lect, or exploitation of an elderly
person or a disabled adult, as those terms are defined in section	F.S. 825.101	,
☐State whether the person is mentally and physically able to pe	rform duties	
☐State if the person is a resident of Florida and, if not, provide	the relationship to the decedent	t.
□Will faithfully administer the estate	•	
☐Provide the Personal Representative's place of residence and	mailing address (if different)	
State that they will promptly file and serve notice on all intere	,	nat I would
not be qualified to serve as PR with the reason and date the ever		
☐State that if the PR changes their address, they will serve notice		in 20 days
Designate a resident agent w/signed acceptance by agent.	1	,
0 0 7 0 1 7 0		
Bond, F.S. 734.102 (4)		
If Testate, waived in Will; or, intestate, waived by all heirs?	\square YES	\square NO
Order Appointing Personal Representative and Letters of A	<u>administration</u>	
	1 (1)	
☐ Testate – does the order admitting the Will contain the corre		
☐ Testate – does the order admitting the Will contain the correct ☐ Does the proposed Letters of Administration name the correct ☐ Does the proposed Letters of Administration name the correct ☐ Does the proposed Letters of Administration name the correct ☐ Does the proposed Letters of Administration name the correct ☐ Does the proposed Letters of Administration name the correct ☐ Does the proposed Letters of Administration name the correct ☐ Does the proposed Letters of Administration name the correct ☐ Does the proposed Letters of Administration name the correct ☐ Does the proposed Letters of Administration name the correct ☐ Does the proposed Letters of Administration name the correct ☐ Does the proposed Letters of Administration name the correct ☐ Does the proposed Letters On Does Does Does Does Does Does Does Does		
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☐Does the proposed Letters of Administration name the correct		
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☐Does the proposed Letters of Administration name the correct		
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☐Does the proposed Letters of Administration name the correct		
☐Does the proposed Letters of Administration name the correct		
Notes:	et person as PR?	
☐Does the proposed Letters of Administration name the correct	et person as PR?	egoing check sheet is accurate.
Notes:	et person as PR?	egoing check sheet is accurate.
Notes: I hereby certify that I have personally reviewed the documents	filed in this matter and that the for	
Notes: I hereby certify that I have personally reviewed the documents	filed in this matter and that the for	
Notes:	filed in this matter and that the for	

IN RE: Estate of	Case No:	CP 000	
	Division: 48		
ANCILLARY SUMMARY ADMINISTR F.S. 733.202 & 734.102 and FI			<u>(E)</u>
Petitioner's Info: Rule 5.200(a) □Name & Address □Name & Office Address of Attorney □Sworn to & Signed by Petitioner(s)	Decedent Info: Rul □ Name & Address □ Date of Death □ State & County of □ Last 4 digits of Soo	domicile	nber
Heirs & Beneficiaries and Marital Status: Rule 5.200 (c) Beneficiaries listed in the Will (if Testate) & heirs at law Address for Beneficiaries & Heirs State their relationship	Other Information: ☐Statement to show ☐State the approxim	required by State venue and value & naturate value on the proceedings	tute or Rule re of assets are pending elsewhere
Rule 5.470 – Authenticated Copies from Domiciliary Estate documented by affidavit or certificate)	(If a petition is not requ	ired in the domic	ciliary estate this must be
Testate : Petition of Dom. Proceeding, Will, Order Admitting Willing Intestate: Petition & authority of PR Is a Death Certificate for the decedent filed? If appointment of someone other than the domiciliary personal regrounds on which appointment is sought (Rule 5.470(3)) Does the name on the death certificate match what is written in the	epresentative is requeste	□YES □YES □YES ed, a statement of □YES □YES	□NO □NO □NO f the facts constituting □NO □NO
Notice – Service is not required on any beneficiary who will distribution. Any beneficiary and any known or reasonably a receive formal notice of this petition. Is not required Formal notice is required and Proof of Service for all entitled had the order of the note service and proof of the note service for all entitled had been discovered by the note of the note service for all entitled had been discovered by the note of the note service for all entitled had been discovered by the note of t	ascertainable creditor in as been filed		
Proposed Order of Summary ☐ Describe the assets & <i>specifically designate</i> the person to wh ☐ When required – make provision for payment of debts as outlined.			
Proposed Order Admitting Exemplified Copies / Order Admitting Will agrees with the date as it □ Order Admitting Will is provided or is in the Summary Order	-	ll & Testament	

Note	res:			
	I hereby certify that I have personally reviewed the do	ocuments filed in this matte	r and that the foregoing check sheet i	s accurate.
By: _		By:		
, –	Attorney of Record	,	Clerk Staff	

IN RE: Estate of		Case No:	CP (000
		_ Division:	48	
DISC	CHARGE OF PERSONAL	REPRESENTA	TIVE	
DEATH CERTIFICATE doc. #: 1	DATE OF DEATH:		_ AGE @ DEATH	I:YRS
LETTERS OF ADMINISTRATION doc. o Is PR also the only trustee o		TO:		
NOTICE OF ADMINISTRATION: Rule ! Served (formal) or Waived on all bene				eneficiaries
NOTICE TO CREDITORS: Rule 5.241 (af		D 111 '		
		Publication:		-
Proof of Publication form		· El ·1 ·1 ,	1.55	
Served on Agency for Healthcare Statement Regarding Creditors		is <u>Florida resident</u> a	na <u>55 yrs or olaer</u>)	
CLAIMS: Rule 5.490 & 5.496 – Are all filed c	claims satisfied or resolved No	one Filed / Yes /	No: see back page	for details.
INVENTORY: Rule 5.340 – 60 days	doc # Served on a	ıll residual heirs –	Yes / No:	see back page
TAXES: F.S. 198.02 Affidavit of No FL Esta	nte Tax Due	<i>or</i> R	eceipt for Estate Ta	x doc #:
		ers must comply with	1 /	
PETITION FOR DISCHARGE: Rule 5.33 Is sole heir or beneficiary also the PR who si Is notice of the Pet for Discharge given to al claimants filed? Has the time expired for filing objections to	doc #: (If no of the Pet. For Discharge? I residual beneficiaries & unsathe discharge of PR?	mount & manner of or or see back or n must be signed by PR ditisfied claimants; of di d	determining fees & comporter section for decorate	tails) tes notice is not required) ciaries & unsatisfied not — see back for details) not — see back for details)
 RECEIPT FROM ALL BENEFICIARIES PETITION FOR DISCHARGE: Rule 5.33 Is sole heir or beneficiary also the PR who sign of the Pet for Discharge given to all claimants filed? Has the time expired for filing objections to Are there any unresolved objections to the P 	doc #: (If no part of the pet. For Discharge? I residual beneficiaries & unsate the discharge of PR? The part of the pet. For Discharge filed?	mount & manner of a no - see back or no must be signed by PR do tisfied claimants; of do	determining fees & compotes section for decorates section fees decorate	res notice is not required) ciaries & unsatisfied not —see back for details)
PETITION FOR DISCHARGE: Rule 5.33 Is sole heir or beneficiary also the PR who si Is notice of the Pet for Discharge given to al claimants filed? Has the time expired for filing objections to Are there any unresolved objections to the PREPORT OF DISTRIBUTION filed?	doc #: (If no part of the discharge of PR? The discharge of PR? The discharge of PR? The discharge filed? The discharge of PR? The discharge of PR? The discharge of PR? The discharge of PR?	mount & manner of or no - see back or no must be signed by PR do tisfied claimants; of do	oc #: (If) oc #: (If) or all residual beneficate #: (If) oc #: (If)	es notice is not required) ciaries & unsatisfied not — see back for details) not — see back for details) not — see back for details)
NOTICE OF FINAL ACCOUNTING RECEIPT FROM ALL BENEFICIARIES PETITION FOR DISCHARGE: Rule 5.33 Is sole heir or beneficiary also the PR who signature is sold to the Pet for Discharge given to all claimants filed? Has the time expired for filing objections to Are there any unresolved objections to the PREPORT OF DISTRIBUTION filed? HOW CAUSE SET FOR: Date:	doc #: (If no part of the discharge of PR? The discharge of PR? The discharge of PR? The discharge filed? The discharge of PR? The discharge of PR? The discharge of PR? The discharge of PR?	mount & manner of one of see back or no must be signed by PR do tisfied claimants; of displaying di	oc #: (If)	es notice is not required) ciaries & unsatisfied not — see back for details) not — see back for details) not — see back for details)
PETITION FOR DISCHARGE: Rule 5.33 Is sole heir or beneficiary also the PR who si Is notice of the Pet for Discharge given to al claimants filed? Has the time expired for filing objections to Are there any unresolved objections to the PREPORT OF DISTRIBUTION filed? HOW CAUSE SET FOR:	doc #: (If no part of the discharge of PR? The discharge of PR? The discharge of PR? The discharge filed? The discharge of PR? The discharge of PR? The discharge of PR? The discharge of PR?	mount & manner of one of see back or no must be signed by PR do tisfied claimants; of displaying di	oc #: (If)	es notice is not required) ciaries & unsatisfied not – see back for details) not – see back for details) not – see back for details)
PETITION FOR DISCHARGE: Rule 5.33 Is sole heir or beneficiary also the PR who si Is notice of the Pet for Discharge given to al claimants filed? Has the time expired for filing objections to Are there any unresolved objections to the PREPORT OF DISTRIBUTION filed? HOW CAUSE SET FOR: Date: Date:	doc #: (If no part of the discharge of PR? The discharge of PR? The discharge of PR? The discharge filed? The discharge of PR? The discharge of PR? The discharge of PR? The discharge of PR?	mount & manner of one of see back or not be signed by PR do tisfied claimants; of died do	determining fees & compotes section for despection	es notice is not required) ciaries & unsatisfied not – see back for details) not – see back for details) not – see back for details)
PETITION FOR DISCHARGE: Rule 5.33 Is sole heir or beneficiary also the PR who si Is notice of the Pet for Discharge given to al claimants filed? Has the time expired for filing objections to Are there any unresolved objections to the PREPORT OF DISTRIBUTION filed? HOW CAUSE SET FOR: Date: Date:	doc #: (If no part of the pet. For Discharge? It residual beneficiaries & unsate the discharge of PR? The tet. For Discharge filed? The part of the pet. For Discharge filed?	mount & manner of one of see back or not be signed by PR do tisfied claimants; of died do	determining fees & compotes section for despection	es notice is not required) ciaries & unsatisfied not – see back for details) not – see back for details) not – see back for details)
PETITION FOR DISCHARGE: Rule 5.33 Is sole heir or beneficiary also the PR who si Is notice of the Pet for Discharge given to al claimants filed? Has the time expired for filing objections to Are there any unresolved objections to the PREPORT OF DISTRIBUTION filed? HOW CAUSE SET FOR: Date: Date:	doc #: (If no part of the pet. For Discharge? It residual beneficiaries & unsate the discharge of PR? The tet. For Discharge filed? The part of the pet. For Discharge filed?	mount & manner of one of see back or not be signed by PR do tisfied claimants; of did do	determining fees & compotes section for description for descri	es notice is not required) ciaries & unsatisfied not — see back for details) not — see back for details) not — see back for details)
PETITION FOR DISCHARGE: Rule 5.33 Is sole heir or beneficiary also the PR who si Is notice of the Pet for Discharge given to al claimants filed? Has the time expired for filing objections to Are there any unresolved objections to the PREPORT OF DISTRIBUTION filed? HOW CAUSE SET FOR: Date: Date:	doc #: (If no processes and processes are the discharge of PR? The discharge of PR? The discharge filed? The doc #: (Must be filed)	mount & manner of or o - see back or n must be signed by PR, ditisfied claimants; of did did did divided when all receip	determining fees & compotes section for despection	es notice is not required) ciaries & unsatisfied not — see back for details) not — see back for details) not — see back for details)
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Docket#	CLAIMS: When there are no funds in the estate to pay claims and there is a trust, a Notice of Trust should be filed. The court will require the claims to be satisfied from the trust and proper releases or satisfactions filed in the estate. NOTE THE COURT WHEN A TRUST IS IN PLACE BUT CLAIMS ARE NOT SATISFIED.	Satisfied/Withdrawn or Stricken	Ntc of Dsc No Funds to Pav	Objection	Proof of Svc of Obj	Time Run for Filing Action	Ntc. of Action filed
Type (R, S, or T)	Beneficiaries/Heirs and Items to Receive – F.S. 731.201 When PR & Trustee are the same person, then beneficiaries of the trust are also beneficiaries of the estate for receiving notice: Notice of Administration, Service of the Inventory, Notice of Final Accounting, and Petition for Discharge or Consent thereto. Types: S=specific, R=residual, PR=personal rep, T=trust beneficiary	Ntc of Adm	Inv (Service)	Acctg Served/Waived	Receipt of Benef	Pet for Dsc Served/Waived	Consent to Dsc of PR.

IN RE: ESTATE OF	CASE NO: CP 000 DIVISION: 48			
DETITION TO DETER				
PETITION TO DETER	WINE HOMESTEAD			
Rule 5.405 – Petition to Determine Homestead must:	Rule 5.240 - *30 days after PR is appointed			
Be a verified statement	□ Notice of Administration. is filed or waived			
Give name of surviving spouse, if any	☐ Proof of service of Notice of Administration is filed			
Contain decedent date of death				
State county of decedent's domicile at death	Rule 5.241 - *30 days after PR is appointed			
□Name surviving spouse and descendants,	□Notice to Creditors showing publication date			
☐ Date of birth for minor descendants, if any	□Proof of publication is filed (45 days after 1st pub)			
Provide legal description of property	☐ Proposed Order reflects proceeds to be held in a Trust			
☐ State the decedent owned & resided on the property @ time of death	account until creditor period expires \text{N/A}			
☐ State how the real property was owned @ time of death	Rule 5.205			
(ex: sole ownership / joint tenancy / tenancy in common / etc)	☐Decedent's death certificate is filed			
☐State that the property is homestead & passes free of creditors;	or			
□ Property does not pass free from creditors				
1 7 1	Relation of person(s) receiving the property -			
<u>Order</u>				
☐Describe the real property (legal description)				
☐ The property is protected homestead of the decedent				
☐ Identifies the person(s) entitled to the homestead				
Defines the interest of each person(s) receiving homestead				
Electrics the interest of each person(s) receiving nomestead				
Notes:				
Pursuant to FL Probate Rule 5.405 Petition				
Intestate Test	<u>Miscellaneous – PR shall promptly send</u> notice and promptly publish for creditors so			
Surviving spouse and lineal descendants (children, grandchildren, etc.) whether or not they are also	, regardless of the will 30 days is a reasonable amount of time for			
descendants of the spouse (e.g. step-children of	en the homestead these items to be filed. Homestead rights can be waived, in writing;			
the spouse) – life estate to the spouse, vested remainder to the lineal descendants of the				
decedent	formal guardianship is required O Homestead owned by decedent and spouse			
	(tenancy by the entireties) passes to the spouse			
I hereby certify that I have personally reviewed the decrease of	alone, outside the estate.			
I hereby certify that I have personally reviewed the documents fil	ed in this matter and that the foregoing check sheet is accurate.			
By:	Ву:			
Attorney of Record Probate Clerk				
y				

IN RE: ESTATE OF		SE NO: /ISION: 48	CP 000	
			/ 131O1 \. 40	
		DMINISTRATION CONTRACTION DESCRIPTION OF CLOSING DO APPLICATION OF CONTRACTION OF		
In compliance with FL Probate Rule 5.460 P		0 11	•	uins:
Petitioner's Information		Attorney In	<u>formation</u>	
☐Petitioner's Name		•	z Phone number	•
□Petitioner's Address		□FL Bar nu	mber	
☐State the Interest of Petitioner		□Signed by		
Describe the asset(s) to be administered	ed	0 ,	,	
☐Give approximate value of asset(s)				
☐Identify asset(s) and location if application	able			
☐Signed by petitioner				
☐State the reason for further administra	ation			
☐Statement as to the relief sought				
Creditors who were not paid in previous adminis	stration must b	e given notice of	this subsequent	filing. Were all the claimants
paid in the previous administration?	\square YES	□NO	\square N/A (Su	_
If no, the court will require notice of this subseq	uent filing on a	all unpaid claimar	nts. Did the unpa	aid claimants receive notice of
this filing?	\square YES	\square NO	\square N/A (Sa	ummary)
Unless specifically needed the court does no	ot have to rev	oke the order of	discharge, reis	ssue letters or require bond.
Does the Proposed Order:				
1. Revoke the Order of Discharge?	\square YES	\square NO		
2. Reissue Letters of Administration?	\square YES	\square NO		
3. Require a Bond?	\square YES	\square NO		
Notes:				
I hereby certify that I have personally reviewed	the documents	filed in this matter:	and that the foreg	oing check sheet is accurate.
Ву:		Ву:		

Probate Clerk

Attorney of Record

IN RE: Estate of		Case No:	CP 000
		Division: 48	
INTESTATE SUMMA	RY ADMINISTRATION	N – F.S. 735.20	1 & Rule 5.530
Petitioner's □Name & address □Name & office address of attorney □Sworn to & signed by petitioner	Decedent □Name & address □Date of death □State & county of dom □Last 4 digits of SS#	nicile	Atty. or ProSe Info. □Name & address □Phone number □Florida Bar number □Signed as attorney
Beneficiaries/Heirs at Law Provide Name & address of Surviving spouse Beneficiaries/Heirs name, address, & relations Year of birth for Minor beneficiary/heir	ship to decedent		
Assets □ Describe approximate value & nature of each □ Separately list homestead & exempt assets □ Describe each asset & name of person to who			
Additional Information Required by Rule or Statement about Venue Statement that after reasonable diligence, the publicate whether or not domiciliary proceedings a Provide the name & address of foreign PR who Facts that the petitioner is entitled to Summar Value of the estate is less than \$75,000	petitioner is unaware of any are pending in another state en proceedings are pending y Administration	or county	
Creditors □ State that all creditor claims are barred; or □ the creditors has been made & one of the following □ the estate is not indebted □ Name & address of each creditor, nat	<u>:</u>	nquiry for any k	nown or reasonably ascertainable
If full payment of the debt is not listed in the Or The name of who will pay the debt Creditors consent to substitution or a: The terms for payment and limitation	ssumption of the debt	-	n must show:
Death Certificate – Rule 5.205(a)(3) Note: The decedent on the documents within the case for Death certificate for decedent is filed Decedent's name on the death certificate does section on this form.	īle.		

<u>Notice</u> – Service is not required on any beneficiary who will redistribution. Any beneficiary and any known or reasonably as receive formal notice of this petition.	
☐ Is not required	
Formal notice is required and Proof of Service for all entitled ha	s been filed
There is a question regarding notice, please refer to the note second	
Proposed Order of Summary	
Describe the assets & specifically designate the person to who	om each asset is to be distributed
☐When required – make provision for payment of debts as outline	
□See Notes Below:	
I hereby certify that I have personally reviewed the documents file	ed in this matter and that the foregoing check sheet is accurate.
By: Attorney of Record	By: Clerk Staff
Attorney of Record	CICIN STATI

IN RE: Estate of	Case Number: _	CP 000			
	Division: 48				
LOST WILL SUMMARY ADM	//////////////////////////////////////	3.207 & Rule 5.530, 5.510 & 5.025			
Petitioner's	<u>Decedent</u>	Atty. Or Pro Se Info			
□ Name & address	□ Name & address	□ Name & address			
□ Name & office address	ice address				
of attorney	☐ State & County of domicile	☐ FL Bar number			
□ Sworn & signed by petitioner	☐ Last 4 digits of s.s. number	☐ Signed by attorney			
Beneficiaries/ Heirs at Law					
□ Name & address of surviving spo	use				
☐ Beneficiaries in Will, Codicil, & S	Separate Writing				
☐ Beneficiaries/ Heirs relationship	to decedent				
☐ Year of birth for minor beneficiar	ry/heir				
Assets					
☐ Detail approximate value & natu					
☐ Separately list homestead & exen					
☐ Describe each asset with the nam	e of the person to whom it is to be distrib	uted			
Last Will & Testament: Rule 5.200	. 10 P 1				
	Identify the Will & Codicils presented for Probate				
☐ State petitioner is unaware of any	other Wills or Codicils				
Rules 5.510 & 5.025					
Adversarial case style on pleadings					
	Petition restates the terms of the will or have a copy of the will attached				
☐ Testimony of disinterested witnes	Testimony of disinterested witness reduced to writing & filed				
<u>Notice</u>					
☐ Formal notice is given to each per	Formal notice is given to each person who would inherit if the will is not established; or				
☐ Consents from all intestate heirs f	Consents from all intestate heirs filed				
☐ Proof of service of formal notice is	Proof of service of formal notice filed				
☐ Time allowed via formal notice h	as run				
Additional Information Required by	Rule or Statute				
☐ Statement about venue					
☐ State whether or not domiciliary	State whether or not domiciliary proceedings are pending in another state or county				
☐ Provide the name & address of fo	Provide the name & address of foreign PR when proceedings are pending				
□ Statement that the decedents will	Statement that the decedents will does not direct administration as required by F.S. 733				

	Facts that the petitioner is entitled to Summary Administration Value is less than \$75,000 or the decedent has been dead more than 2 years
Cr	<u>editors</u>
	State that all creditor claims are barred; or that after diligent search and inquiry for any known reasonably ascertainable creditors has been made and one of the following: The estate is indebted
	□ Name & address of each creditor, nature & amount of debt
If 1	Full payment of the debt is not listed in the Order of Summary Administration the petition must show: □ The name of who will pay the debt
	☐ Creditors consent to substitution or assumption of the debt ☐ The terms for payment & limitation of liability on the person paying the debt
	eath Certificate – Rule 5.205(a)(3) Note: The name on the death certificate must match the name provided for
<u> </u>	e decedent on the documents within the case file. Death Certificate for the decedent is filed
	Decedent's name on the death certificate does not match the name on the forms for administration. Please refer to notes section on this form.
<u>O1</u>	der Admitting Will
	The date in the Order Admitting Will agrees with the date as it appears in the Last Will & Testament The Order Admitting Will has a copy of the Will attached or the Will is restated
Oı	der of Summary Administration
	Describe the assets and <i>specifically designate</i> the person to whom each asset is to be distributed
	When required – make provisions for payment of debts as outlined in Probate Rule 5.530(9)
Se	e notes below:
_	
	ereby certify that I have personally reviewed the documents filed in this matter and that the foregoing check sheet accurate.
	By:
	By: By: Clerk Staff

IN RE: Estate of		Case No: CP 000 Division: 48			
TESTATE SUMMARY ADMINISTRATION – F.S.735.201 & Rule 5.530					
Petitioner's □ Name & address	<u>Decedent</u> □Name & address	•	<u>r ProSe Info.</u> e & address		
☐ Name & office address of attorney ☐ Sworn to & signed by petitioner	☐Date of death ☐State & county of domicile ☐ Last 4 digits of Soc. Sec. number	□FL Ba	ne number ar number ed as attorney		
Beneficiaries/Heirs at Law ☐ Beneficiaries in Will, Codicil, & Sepa ☐ Beneficiaries/Heirs relationship to de ☐ Year of birth for Minor beneficiary/	ecedent				
Assets ☐ Detail approximate value & nature of ☐ Separately list homestead & exempt a ☐ Describe each asset with the name of	assets	outed			
Information about the Will ☐ Identify all unrevoked Wills & codicing ☐ State the petitioner(s) is unaware of a ☐ Will is proved, or ☐ Oath of Witness completed ☐ Proof of Will by ☐ Court to appoint a Commission to ta	ny other unrevoked Will				
Additional Information Required by ☐ Statement about Venue ☐ State whether or not domiciliary proc ☐ Provide the name & address of foreig ☐ Statement that the decedent's Will do ☐ Facts that the petitioner is entitled to ☐ Value is less	ceedings are pending in another state of the PR when proceedings are pending the pending that the pending the pending are pending to the pending that the pendi	ed by F.S. 733	ore than 2 years		
Creditors ☐ State that all creditor claims are barre ascertainablecreditors has been made an ☐ the estate is not indebted.	nd one of the following:	inquiry for any l	known or reasonably		
	creditor, nature & amount of debt in the Order of Summary Administrat	-	ı must show:		

	n the death certificate must match the name provided for the
decedent on the documents within the case file.	
☐ Death certificate for decedent is filed	d d C C liid Dl C d
	the name on the forms for administration. Please refer to notes
section on this form.	
Order Admitting Will	
e e e e e e e e e e e e e e e e e e e	
☐ The date in the Order Admitting Will agrees with the dat ☐ Order admitting will is provided or is in the summary or	
Torder admitting win is provided of is in the summary of	ICI
Order of Summary	
Describe the assets and specifically designate the person	on to whom each asset is to be distributed
☐ When required – make provision for payment of debts as	
☐ See Notes Below	
□ <u>Notes:</u>	
I hereby certify that I have personally reviewed the docume	nts filed in this matter and that the foregoing check sheet is accurate.
By:	Ву:
Attorney of Record	Clerk Staff