CLERK OF THE CIRCUIT COURT

**PROBATE DIVISION, FLAGLER COUNTY, FLORIDA**

**IN RE: Estate of Case No: \_\_\_\_\_\_\_\_\_\_ CP 000 \_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Division: 48**

## DISCHARGE OF PERSONAL REPRESENTATIVE

**Death Certificate *doc. #***: \_\_\_\_\_\_ **DATE OF DEATH:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **AGE @ DEATH:** \_\_\_\_\_\_\_\_\_\_YRS

**LETTERS OF ADMINISTRATION *doc*. *#***: **\_\_\_\_\_\_ ON: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ TO: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* + Is PR also the only trustee of decedent’s trust? \_\_\_\_\_\_

**NOTICE OF ADMINISTRATION: Rule 5.240 *doc. #***: \_\_\_\_\_\_ *(If PR is also trustee of decedent’s trust, then trust beneficiaries*

Served (formal) or Waived on all beneficiaries: Yes / No - *are entitled to notices as estate beneficiaries)*

**NOTICE TO CREDITORS: Rule 5.241 (after 5/1/2002)**

Notice to Creditor form ***doc #*** \_\_\_\_\_\_ Date of 1st Publication: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Proof of Publication form ***doc #*** \_\_\_\_\_\_

Served on Agency for Healthcare ***doc #*** \_\_\_\_\_\_ *(decedent who is Florida resident and 55 yrs or older)*

Statement Regarding Creditors ***doc #*** \_\_\_\_\_\_

**CLAIMS: Rule 5.490 & 5.496** – Are all filed claims satisfied or resolved None Filed / Yes / No: see back page for details.

**INVENTORY: Rule 5.340 –** 60 days ***doc #*** \_\_\_\_\_\_ Served on all residual heirs – **Yes** / **No**: see back page

**TAXES: F.S. 198.02** Affidavit of No FL Estate Tax Due ***doc #:*** \_\_\_\_\_\_ ***or*** Receipt for Estate Tax ***doc #:*** \_\_\_\_\_\_

**FINAL ACCOUNTING** (indicate if waived) ***doc #:*** \_\_\_\_\_\_ *(waivers must comply with Rule 5.180(b) w/statement they know*

**NOTICE OF FINAL ACCOUNTING** ***doc #:*** \_\_\_\_\_\_ *the amount & manner of determining fees & compensation)*

**RECEIPT FROM ALL BENEFICIARIES** ***doc #:*** \_\_\_\_\_\_ ***(If no - see back or notes section for details)***

**PETITION FOR DISCHARGE: Rule 5.330 & 5.400 *doc #:*** \_\_\_\_\_\_ *(must be signed by PR)*

* Is sole heir or beneficiary also the PR who signed the Pet. For Discharge? ***doc #:*** \_\_\_\_\_\_ *(If yes notice is not required)*
* Is notice of the Pet for Discharge given to all residual beneficiaries & unsatisfied claimants; or all residual beneficiaries & unsatisfied claimants filed? ***doc #:*** \_\_\_\_\_\_ *(If not –see back for details)*
* Has the time expired for filing objections to the discharge of PR? ***doc #:*** \_\_\_\_\_\_ *(If not – see back for details)*
* Are there any unresolved objections to the Pet. For Discharge filed? ***doc #:*** \_\_\_\_\_\_ *(If not – see back for details)*

**REPORT OF DISTRIBUTION filed? *doc #:*** \_\_\_\_\_\_ ***(Must be filed when all receipts are not filed.)***

### SHOW CAUSE SET FOR: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Follow Up Review Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### NOTES: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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I hereby certify that I have personally reviewed the documents filed in this matter and that the foregoing check sheet is accurate.

By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Attorney of Record Probate Clerk

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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/Withdrawnor Stricken | Ntc of Dsc No Funds to Pay | Objection | Proof of Svc of Obj | Time Run for Filing Action | Ntc. of Action filed |
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| **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) | AcctgServed/Waived. | Receipt of Benef | Pet for DscServed/Waived | Consent to Dsc of PR. |
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