**IN RE: Estate of**

 **Case No** **PRDL**

 **Deceased Division:**

**WORKSHEET – SUMMARY ADMINISTRATION**

***IN THIS FORM REFERENCE TO A WILL SHALL ALSO INCORPORATE ANY CODICIL WHEN FILED.***

ESTATE: Indicate **Yes** (Y) in the appropriate field(s)

Testate Intestate Ancillary Non-Resident w/no domiciliary estate

Testate: Is the original Will filed with clerk in Volusia County?

[If not yes, indicate where it is located]

**Petitioner’s Information: FL Probate R. 5.200 (a) & (d) YES N/A**

|  |  |  |
| --- | --- | --- |
| Petitioner’s Name and Address. In notes state relationship of petitioner and if a Pro Se filer.  |     |  |
| Statement of the petitioner’s interest  |     |  |
| Name and Office Address of petitioner’s attorney. Indicate N/A if Pro Se filer  |     |     |
| A statement showing venue.  |     |  |
| Signed by petitioner under penalty of perjury |     |  |
| **NOTES:** |

**Decedent’s Information: FL Probate R. 5.200 (b) YES N/A**

|  |  |  |
| --- | --- | --- |
| Decedent’s Name and Address |     |  |
| Last 4 numbers of Social Security |     |  |
| County and State of domicile |     |  |
| Place of Death |     |  |
| Date of Death  |     |  |
| **NOTES:**  |

**Death Certificate: FL Probate R. 5.205 and Judicial direction**: Differences in the spelling of decedent’s name between the death certificate and case style must be cleared in the petition or by affidavit

* **Proof of Death required to be filed prior to the entry of Determination of Beneficiaries, Determination of Homestead or Order of Summary Administration YES N/A**

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| --- | --- | --- |
| Is a Death Certificate filed at this review? |     |     |
| Are there any name differences between the death certificate and documents filed? Review Clerk: Add to notes below any discrepancies or other names or alias not plead. Per Judge this is not a notable issue on estates represented by counsel. [Indicate N/A when the death certificate is not filed at the time of the review]  |     |     |
| **NOTES:**  |

 **Heirs & Beneficiaries and Marital Status: FL Probate R. 5.200 {c}**

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| --- | --- | --- |
|  Name and address of surviving spouse, if any Mark as N/A if no spouse listed.  |     |     |
| **Pro Se: Has heir affidavit been filed?** If yes, identify DIN # . N/A if estate represented by attorney.  |     |     |
| Name and address of **beneficiaries** named in the Will? **[Testate]** Mark N/A if intestate estate |     |     |
| Name and address of heirs at law [**Intestate}** Persons who inherit when there is no Will. Mark N/A for Testate estate.  |     |     |
| Indicate the year of birth for any heirs/beneficiaries who are minors? |     |     |
| **NOTES:**  |

 **Additional info required to be provided in PETITION YES N/A**

|  |  |  |
| --- | --- | --- |
| Whether domiciliary proceedings are pending in another State or County |     |  |
| **If proceedings are pending**, provide name and address of foreign PR |     |     |
| Describe nature and approximate value of all assets. C*omplete detail of assets, If not provided has an explanation been submitted?* Detail explanation submitted in notes.  |     |  |
| Separately list or distinguish homestead and exempt assets. Refer to homestead worksheet if homestead petition has been filed.  |     |     |
| Per F.S. 733 state there is no known or unrevoked Will that would require administration  |     |  |
| State the estate value is less than 75,000 or decedent has been dead for more than 2 years. After 2 years from date of death the $75,000 estate cap no longer applies. Value of homestead property does not count towards the value of the estate.  |     |  |
| **Creditors**  | xxxxx | xxxxx |
| State all creditor claims are barred OR that after diligent search and inquiry there are no known or easily ascertainable creditors **and** one of the following:  |     |  |
|  A. The estate is not indebted  |     |     |
|  B. Give name and address of each creditor, nature and amount of debt  |     |     |
| **If full payment to the creditor is not provided in the Order of Summary the petition must**: If no claims filed at the time of this review or are barred mark below as N/A.  | xxxxx | xxxxx |
|  A. Show the name of who will pay the debt(s) |     |     |
|  B. Provide Creditors consent to substitution of assumption of the debt |     |     |
|  C. The terms of payment and limitation of liability on the person paying the debt |     |     |
| **Has notice of the petition been provided to any creditor that has filed a claim in the estate or identified in the petition as a known creditor? If no, provide name of creditor in notes.**  |     |     |
| **NOTES:**  |

**Notice is not required on any heir at law or beneficiary under a WILL who will receive full distribution. Any heir and known creditor not joining or consenting to the Petition for Summary Administration who is NOT being paid the claim amount or receiving a full distributive share shall receive formal notice and proof of service filed.**

**NOTICE**

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| --- | --- | --- |
| Does there appear to be any issue regarding notice? Mark as N/A if all heirs are receiving their  FULL distributive share. In **Testate** estates look for proof of service on any person that has been specifically declared to be disinherited. (this does not include contingent benef. Or when the will provides family information)  |     |     |
| Have any objections been filed? If yes, identify in notes.  |     |     |
| **NOTES:** |

**[Mark as N/A when the estate is INTESTATE to indicate this section does not apply and can be skipped]**

**Testate - Other Information Required in Petition by FL Probate R. 5.200** **[ ]  N/A YES N/A**

|  |  |  |
| --- | --- | --- |
| Identify the Will being offered for Probate and also state the petitioner is unaware of any other Wills? [If there are other known Wills, the petition shall state why it is not being probated.] |     |     |
| **Ancillary Administration**: FL Probate Rule 5.470Authenticated copy from domiciliary of Petition (provide Affidavit from foreign estate when a Petition is not required), Will, Order Admitting Will and Authority of Domiciliary PR.  |     |     |
| Notes:       |

**Last Will & Testament/Lost or Destroyed Will** **[ ]  N/A YES N/A**

|  |  |  |
| --- | --- | --- |
| Is the Will in possession of the clerk or does it accompany the petition? Will not be e-filed unless it is part of an authenticated package from domiciliary estate.  |     |  |
| Is the Will self proving? If not, is it proved by Oath of Witness or Proof of Will? Oath or Proof can be signed before any Judge or clerk regardless of the state. If witness signs before a notary or attorney verify commission is in file.  |     |  |
| Lost or Destroyed Will has been submitted for probate. **Refer to Lost will worksheet** (mark N/A if original WILL is filed)  |     |     |
| **NOTES:**  |

**[Mark as N/A when the estate is TESTATE to indicate this section does not apply and can be skipped]**

 **Intestate – Other Information Required in Petition by FL Probate R. 5.200** **[ ]  N/A YES N/A**

|  |  |  |
| --- | --- | --- |
| State that after exercise of reasonable diligence and search there are no unrevoked Will or Codicil in which to probate.  |     |  |
| If the petitioner is aware of an unrevoked Will or Codicil, a statement why it is not being admitted to probate. N/A if Will is submitted is being offered for probate.  |     |     |
| Are Consents to Petition for Summary filed? Mark N/A as not required if all heirs are receiving full distribution. [ ]  Heirs are receiving full distributive share.  |     |     |
| **Ancillary Administration**: FL Probate Rule 5.470Authenticated copy from domiciliary est. of Petition (provide Affdvt. from foreign est. when a Petition is not required) & Authority of Domiciliary PR. Mark N/A if not ancillary.  |     |     |
| **NOTES:**  |

**Order of Summary Administration YES N/A**

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| Testate: Has an **Order Admitting Will** been submitted or Order of Summary states the Will “**is admitted to probate”?** When Order of Summary states Will has been admitted need separate order. Clerk mark N/A if intestate.  |     |     |
| Testate: Does the order contain the correct date of the Will? Clerk mark N/A if intestate |     |     |
| Does the order describe the assets? |     |  |
| Does the Order identify or designate who is to receive each asset?  |     |  |
| If there are outstanding debts, does the order make provision for payment of the debt?  |     |     |
| **NOTES:** |

**Other Notes Related to File**

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| --- |
| **NOTES:** |