Checklist for:

Petition for Determination of Beneficiaries and Shares

| Estate of: |
| --- |
| | File #: |  | Date: | |  | | --- | --- | --- | --- | --- | | Attorney: |  | |  |  | |

§733.105 Fla. Stat. Determination of beneficiaries. Fla. Probate Rule 5.385 Determination of Beneficiaries and Shares

| Docket# | Item# | Date |  |
| --- | --- | --- | --- |
|  |  |  | Is petitioner the Personal Representative or another interested person? [5.385(a)] |
|  |  |  | Does Petition include: names, residences, and mailing addresses of ALL persons who may have an interest, except creditors, known to petitioner? [5.385(b)(1)] |
|  |  |  | Does Petition include statement of the nature of the interest of each individual? [5.385(b)(2)] |
|  |  |  | Does Petition include designation of any person who is a minor or incapacitated and whether there is a legal guardianship thereto in Florida? [5.385(b)(3)] |
|  |  |  | Does Petition include statement by petitioner whether there are persons whose names are not known to petitioner who have claims against, or interest in, the estate as beneficiaries.[5.385(b)(4)] |
|  |  |  | Is it a verified Petition? |
|  |  |  | Waiver [5.385(c), 5.180, 731.302] |
|  |  |  | If not Waiver by all interested persons, Formal notice [731.301] and Hearing [5.385(c)] |
|  |  |  | Does the Order include statement identifying the beneficiaries, shares and amount they are entitled to receive or both? [5.385(c)] |
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| Comments: |
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