

IN RE: ESTATE OF:

Case No.: _____

Deceased
_____ /

Checklist and Certification – PETITION FOR FORMAL ADMINISTRATION CHECKLIST

I, _____, as the attorney of record, have reviewed the applicable checklist(s) on the 20th Judicial Circuit Court's website, and filed the following pleadings to the Clerk of Court's docket, for which I have written the docket entry number next to each of the corresponding requirements below.

Please do not submit this checklist, orders and letters until all documents are posted in Odyssey.

Original Death Certificate deposited with the Clerk of Court, Dk. No. _____

Petition for Administration filed with the Clerk of Court, Dk. No. _____

- Petition is verified
- Petition contains Petitioner's name and address, a statement of the Petitioner's interest, and the name and address of Petitioner's attorney
- Petition contains name, LKA, last 4 digits of the SSN, date and place of death of the decedent and the state county of decedent's domicile.
- Names and addresses of the surviving spouse, if any, the beneficiaries, their relationship to decedent and the birth year of any minors.
- Petition contains venue statement
- Statement of the priority, under [section 733.301, Florida Statutes](#), of the person seeking appointment as the personal representative. Statement if any other person has equal or higher preference in appointment (if so, their name and whether they will be served with formal notice).
- Statement whether domiciliary or principal proceedings are pending in another state or country, if known, and the name and address of the foreign personal representative and the court issuing letters
- Petition contains the approximate value and nature of the assets;
- IF INTESTATE, statement that after the exercise of reasonable diligence the petitioner is unaware of any unrevoked wills or codicils, or if the petitioner is aware of any unrevoked wills or codicils, a statement why the wills or codicils are not being probated
- IF TESTATE, a statement identifying all unrevoked wills and codicils being presented for probate, and a statement that the petitioner is unaware of any other unrevoked wills or codicils or, if the petitioner is aware of any other unrevoked wills or codicils, a statement why the other wills or codicils are not being probated;
- If TESTATE, a statement that the original of the decedent's last will is in the possession of the court or accompanies the petition, or that an authenticated copy of a will deposited with or probated in another jurisdiction or that an authenticated copy of a notarial will, the original of which is in the possession of a foreign notary, accompanies the petition; and

- Statement that the personal representative seeking appointment is qualified to serve under the laws of Florida as a business entity under [section 733.305, Florida Statutes](#), or, if an individual, that the person is qualified to serve under the laws of Florida, including:
 - ___ Whether the person has been convicted of a felony;
 - ___ Whether the person is mentally and physically able to perform the duties of a personal representative
 - ___ That the person is 18 years of age or older; and
 - ___ Whether the person is a resident of Florida and, if not a resident, a statement of the person's relationship to the decedent in accordance with [section 733.304, Florida Statutes](#).

Notice Provided:

- Waiver and Consent to Appointment of Personal Representative from majority in interest of the heirs – Fla. Stat. § 733.301(b); Fla. Prob. R. 5.201 OR
- Proof of Formal Notice on all persons qualified to act as personal representative and who are entitled to preference equal to or greater than petitioner - Fla. Prob. R. 5.040

Notice of Administration:

- ___ All parties previously served under 733.2123
- ___ Served on surviving spouse
- ___ Served on All beneficiaries
- ___ Served on trustee of any trust,
- ___ Served on beneficiary of trust of trustee is also the PR
- ___ Served on persons entitled to exempt property
- ___ Waivers of Notice of Administration filed by ALL parties entitled to notice

Depository:

- Petition for Restricted Depository, Dk. No. _____ OR
- The estate contain no liquid assets

Bond (if requested):

- Petition to Set Bond, Dk. No. _____
- Verified inventory – Fla. Stat. §733.604, Dk. No. _____

Supporting Documents:

- Affidavit of Heirs, Dk. No. _____
- Copy of death certificate for any deceased beneficiary, Dk. No. _____
- Oath of Personal Representative and Designation and Acceptance of Resident Agent - Fla. Prob. R. 5.320 and 5.110, Dk. No. _____

Proposed Orders submitted to Court:

- Order Appointing Personal Representative and setting bond, if any
- Letters of Administration

Order Designating Depository for Assets (if applicable)

I HEREBY CERTIFY that I have complied with the above checklist and filed the required pleadings and supporting documentation on the date indicated above in accordance with applicable Florida Statutes, Florida Probate Rules, local rules, administrative orders, and administrative memoranda. I understand that submission of this checklist is considered an official statement subject to Fla. Stat. § 837.06

Dated: _____

Attorney's Signature

Printed Name: _____

Bar Number: _____

Email Address(es): _____