

IN RE: ESTATE OF:

Case No.: _____

Deceased
_____ /

Checklist and Certification – PETITION FOR SUMMARY 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 the checklist and order until all documents are posted in Odyssey.

Qualification - Fla. Stat. § 735.201:

- Decedent has been dead for more than 2 years OR
- Value of the entire estate subject to administration in this state is less than \$75,000
- Decedent’s will does not direct administration as required by Chapter 733 Florida Statutes (testate only)

Original Documents:

- Authenticated copy of death certificate has been deposited with the Clerk of Courts – Fla. Prob. R. 5.171, Dk. No. ____
- Original Will has been deposited with the Clerk of Courts, Dk. No. ____ (testate only)

Petition for Summary Administration:

- Petition for Summary Administration - Fla. Prob. R. 5.530, Dk. No. ____, contains the following:
 - Petitioner/Petitioner(s)’ name(s) and address(es)/attorney name and address; name and LKA of Decedent, last 4 digits of SSN, and date and place of death/state and county of domicile
 - Names and addresses of surviving spouse and beneficiaries (including relationship) and year of birth if any minors
 - Venue allegation
 - Whether proceedings are pending in another state, if yes then name and address of PR in foreign state and court issues letters
 - Description of assets and estimated value, separate description of homestead or exempt property and a schedule of proposed distribution
 - Testate: Statement identifying all unrevoked wills and codicils and that there are no other wills or codicils
 - Intestate: Statement that after exercise of reasonable diligence Petitioners are unaware of any unrevoked wills or codicils.

- Statement that All creditors' claims are barred, OR
- Statement that "a diligent search and reasonable inquiry for any known or reasonably ascertainable creditors has been made and one of the following:"
 - Statement that estate is not indebted, OR
 - The Name and address of each creditor, the nature of the debt, the amount of the debt (i.e. if estimated or exact), and when the debt is due.
 - If payment is being made other than full payment through the proposed administration then include:
 - Name of person paying debt
 - Creditors written consent for substitution or assumption
 - Amount if the debt is compromised
 - Terms for payment and limitation on liability of person paying the debt
- Petition is verified by the surviving spouse (if any) and all beneficiaries, OR
- Joinder to Petition has been filed for each beneficiary, Dk. No. _____ OR
- Proof of Formal Notice has been filed for any beneficiary who is receiving their full share under Florida law, Dk. No. _____

Supporting Documents:

- Affidavit of Heirs, Dk. No. _____
- Copy of paid funeral bill (not required if decedent has been dead more than 2 years), Dk. No. _____
- Copy of death certificate for any deceased beneficiary, Dk. No. _____
- Oath of Witness to Will (if Will is not self-proving under Fla. Stat. § 732.503) - Fla. Stat. § 733.201, Dk. No. _____
- Notice of Trust (if applicable)

Proposed Orders submitted to Court:

- Order of Summary Administration – Fla. Stat. § 735.206
- Order Admitting Will to Probate

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): _____