**Checklist for:**

**Ancillary Administration**

|  |
| --- |
| **Estate of:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **File #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| **Attorney: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |

FS 734.102; PR 5.470; PR qualifications: FS 733.304; Short Form Ancillary see FPR 5.475 – separate checklist;

*Authenticated* copies of the following are to be filed (see def. below):

**TESTATE**

|  |  |  |  |
| --- | --- | --- | --- |
| **Docket #** | **Item #** | **Date** |  |
|  |  |  | Will |
|  |  |  | Petition for Probate |
|  |  |  | Order admitting Will to Probate(and authority letters of PR per Fla. Probate Rule (5.470) |

**INTESTATE**

|  |  |  |  |
| --- | --- | --- | --- |
| **Docket #** | **Item #** | **Date** |  |
|  |  |  | The Petition for Letters  |
|  |  |  | Letters |

**ALL**

|  |  |  |  |
| --- | --- | --- | --- |
| **Docket #** | **Item #** | **Date** |  |
|  |  |  | Certified Copy of Death Certificate |
|  |  |  | Verified Petition |
|  |  |  | Petitioner’s relation to decedent and place of residence |
|  |  |  | Beneficiaries and birth dates of minors listed |

**PERSONAL REPRESENTATIVE**

Reason for preference:

 Appointed in Will/or appointed as Successor

 Foreign PR (if qualified)

 Person entitled to majority of Florida property

Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Will is executed in conformity with law of state or country where will was executed. FS 732.502; *Estate of Swanson*

 *v. Larson*, 397 So. 2d 465 (Fla. 2d DCA 1981)

 Bond considerations -

Cash assets: $

Other assets: $

 Petition to waive bond filed and served on interested

 Bond waived by interested parties/waived by Will

 \_\_\_\_\_Oath

Attorney: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ FPR 5.030; *Dimitroff v. Taylor*, 651 So. 2d 131 (2d 1995).

Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

RECOMMENDATION: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*\* 5.470b(1) – Before ancillary letters can be issued, formal notice to all known persons qualified to act as an ancillary personal representative and whose entitlement to preference of appointment is equal to or greater than petitioner’s and who have not waived notice or joined in the petition.