Checklist for:

**CASE MANAGEMENT**

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

**THIS FILE CONTAINS THE FOLLOWING ITEMS**

|  |  |  |  |
| --- | --- | --- | --- |
| Docket# | Item# | Date |  |
|  |  |  | Inventory [733.604 (a)(a) |
|  |  |  | Proof of publication of Notice to Creditors (not required if decedent deceased for more than 2 years) [733.2121, 5.241 (c)] |
|  |  |  | Statement Regarding Creditors (not required if decedent deceased for more than 2 years) [5.241 (d) |
|  |  |  | Creditor’s notice sent to AHCA, if decedent is age 55 or older (not required if decedent deceased for more than 2 years) [733.2121 (3)(d), 5.241 (a)] |
|  |  |  | Creditor’s notice or inventory sent to FL Dept of Revenue (not required if decedent deceased for more than 2 years) [733.2121 (3)(e)] |
|  |  |  | Formal notice of admin. to or waivers from all benes [731.302, 733.212, 5.180] |
|  |  |  | Non-tax affidavit ; or  FL tax closing letters AND Fed estate tax closing letters [FS 198.26, 198.32] |
|  |  |  | Proof of all claims settled (or ntc if no assets) [733.705, 5.400 (b)(2)] |
|  |  |  | Petition for Discharge (w/ waivers or final accounting) [5.400] |
|  |  |  | Proposed distribution (listed or waived) [5.400 (b)(5)] |
|  |  |  | Final accounting or waivers [5.180, 5.346, 5.400 (a)] |
|  |  |  | Notice of discharge, final accounting to benes and creditors (or waivers) [731.301, 731.302, 5.180, 5.400 (c)] |
|  |  |  | Proof of distribution (receipts or cashed checks) [5.400 (e)] |
|  |  |  | If applicable:   1. Notice of adversary proceeding [5.025] 2. Notice of civil action or ancillary [5.065] 3. Notice of federal estate tax return due [5.395] |

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| **Beneficiaries** |  | **Creditors** |
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| Comments: |
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