Checklist for:

**STATUS REPORT**

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

**THE PERSONAL REPRESENTATIVE HAS OR WILL SUBMIT THE FOLLOWING**

|  |  |  |  |
| --- | --- | --- | --- |
| Docket# | Item# | Date |  |
|  |  |  | Inventory |
|  |  |  | Proof of publication |
|  |  |  | Service of the Notice to Creditors or Inventory on the Florida Department of Revenue |
|  |  |  | Service of the Notice to Creditors on AHCA, if required |
|  |  |  | Statement Regarding Creditors |
|  |  |  | Florida nontaxable affidavit (DR-312) |
|  |  |  | Federal estate tax return (706), if required, and the notice of federal estate tax return due date |
|  |  |  | Notice of civil action or ancillary administration |
|  |  |  | Notice of Trust, if applicable |
|  |  |  | If a civil action is being contemplated, the anticipated date a decision will be made as to whether an action will be filed |
|  |  |  | If a civil action has been filed, or ancillary administration commenced, the estimated date of conclusion and case number |
|  |  |  | Final accounting and petition for discharge |
|  |  |  | Any matter that prevents the estate from being closed |
|  |  |  | Estimated time when the estate will be ready for closure |

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| Comments: |
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