Checklist for:

**Petition for Administration (Testate)**

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

| Docket# | Item# | Date |  |
| --- | --- | --- | --- |
|  |  |  | Certified copy of death certificate [731.103(1), 5.171(a), 5.205(a)(1), 5.205(c)] |
|  |  |  | Petitioner’s name, interest in estate and address [731.201(20), 733.202, 5.200(a)] |
|  |  |  | Name, last known address and last four digits of social security number of decedent [5.200(b)] |
|  |  |  | Date and place of death of decedent and state and county of decedent’s domicile [5.200(b)] |
|  |  |  | Surviving spouse (if any) and correct beneficiaries with respective relationships and addresses listed and birthdates for minor beneficiares included [731.201(2), 5.200(c)]  [ ] Minors?\_\_\_\_ |
|  |  |  | Venue is proper [733.101, 5.050, 5.200(d) |
|  |  |  | Petitioner (*individual*) must be either \_\_\_a FL resident OR **\_\_\_**related to decedent w/in certain degree and otherwise qualify as a Personal Representative under FL law. Petitioner *(corporate)* must be qualified under FL law. [733.302, 733.303, 733.304,733.305 733.733.305]  (corporate) must be qualified to serve under FL law [733.302, 733.303, 733.304, 733.305] |
|  |  |  | Priority to serve as Personal Representative: [733.301(1)(a), 5.200(e), 733.2123, 5.201(b)]  \_\_\_PR named in Will \_\_\_Other preference \_\_\_No preference but proper notice given |
|  |  |  | Domiciliary or principal proceedings pending in another state or country?  If so, name and address of foreign representative and court issuing letters [5.200(f)] |
|  |  |  | Assets AND approximate values listed [5.200(g)] |
|  |  |  | Verified petition [5.200, 5.020(e)] |
|  |  |  | Will is an original Will (not a copy) \_\_\_ ORPetition to Establish Lost Will is filed **\_\_\_** OR \_\_\_authenticated copy of Will filed[733.207, 5.510, 733.206, 5.200(j)] |
|  |  |  | \_\_\_Will is self-proved [732.503, 733.201(1)] OR **\_\_\_**Will is not self-proved AND Oath of Witness filed [733.201(2)] |
|  |  |  | Either \_\_\_a statement petitioner is unaware of any unrevoked Wills or Codicils other than the Will and Codicil(s) being presented for probate OR **\_\_\_**statement why other unrevoked Wills or Codicils are not being probated. [5.200(h)]  Wills or Codicils are not being probated. [5.200(h)] |
|  |  |  | Bond Considerations [733.402, 733.403]  Cash Assets: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Other Assets: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  |  | Bond either \_\_\_waived in Will OR **\_**\_\_ waived by interested parties OR \_\_\_ Petition to Waive Bond filed [733.402(1), 733.402(4), 5.180, 5.235] |
|  |  |  | Wrongful death case? |
|  |  |  | Oath and designation of resident agent [5.110, 5.235(a)(3), 5.320] |
|  |  |  | Proposed correct Order Admitting Will and Appointing Personal Representative |
|  |  |  | Proposed correct Letters of Administration |
|  |  |  | Attorney Required? [5.030] |

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| Comments: |
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