IN RE: ESTATE OF: Case No.: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Deceased

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_/

**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 with the Clerk of Court **Please do not submit the checklist and order until all documents are posted in Odyssey.**

Qualification - §735.201, Fla. Stat., and Fla. Prob. R. 5.530:

☐ Decedent has been dead for more than 2 years; or is presumed dead under Fla. Prob. R. 5.171(c)

☐ Value of the entire estate subject to administration in this state does not exceed $75,000

☐ Decedent’s will does not direct administration as required by Ch. 733, Fla. Stat. (Testate only)

☐ Petitioner is either: (a) a beneficiary; (b) a nominated PR under decedent’s will, if any; or (c) an heir at law (if no will)

Original Documents:

☐ Authenticated copy of death certificate has been deposited with the Clerk of Courts – Fla. Prob. R. 5.171, filed on\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

☐ Original Will has been deposited (*cannot be e-filed*) with the Clerk of Courts, filed on\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (testate only)

☐ Original Will has been proved [§735.206(1), Fla. Stat.]

Petition for Summary Administration:

The verified Petition for Summary Administration - Fla. Prob. R. 5.530 and §735.203, Fla. Stat., filed on\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, contains the following:

☐ Statement of interest of each Petitioner [Fla. Prob. R. 5.530(a)(1)], each petitioner’s name and address, and the name and office address of each petitioner’s attorney

☐ The name and last known address 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, of minors

☐ A statement showing venue

☐ Whether domiciliary or principal proceedings are pending in another state, or country, if known, and the name and address of the foreign personal representative and the court issuing letters

☐ Description of assets and estimated value of each, separate description of homestead or exempt property and a schedule of proposed distribution

☐ Testate: Statement identifying all unrevoked wills and codicils and that there is no knowledge or awareness of other unrevoked wills or codicils

☐ Intestate: Statement that after exercise of reasonable diligence Petitioners are unaware of any unrevoked wills or codicils.

☐ Formal Notice of Petition served on any beneficiary not joining in Petitioner [or other person designated in F.S. 735.203(2)]

☐ 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, filed on \_\_\_\_\_ , OR

☐ Proof of Formal Notice has been filed for any beneficiary who is (a) receiving their full share under Florida law, filed on\_\_\_\_\_\_\_\_\_\_\_\_\_\_; or (b) is not joining in the Petition [F.S. 735.203(1)]

Supporting Documents:

☐ Affidavit of Heirs, filed on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

☐ Copy of paid funeral bill (not required if decedent has been dead more than 2 years), filed on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

☐ Authenticated copy of death certificate for any deceased beneficiary, filed on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

☐ Oath of Witness to Will (if Will is not self-proving under §732.503, Fla. Stat.) - §733.201, Fla. Stat., filed on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

☐ Notice of Trust (if applicable)

☐ Notice to creditors if published [§735.2063, Fla. Stat.]

☐ Order of Summary Administration – §735.206, Fla. Stat.

☐ Order Admitting will, if any, to Probate (including codicils)

**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 §837.06, Fla. Stat.

Dated: \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Attorney's Signature

Printed Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bar Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address(es):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_