**SUMMARY ADMINISTRATION CHECKLIST**

**PROBATE CASE NO.:**  **DATE OF DEATH:**

**ESTATE OF:**

**ATTORNEY OF RECORD:**

**ESTATE: Testate**   **Intestate**   **Ancillary**

1. Original **WILL** filed? YES NO N/A OTHER
2. Death Certificate Filed? YES NO

 Recorded in Public Records: YES NO Book & Page No.

 Filed in another case: CASE NAME:

 COURT: CASE NO.:

1. Personal Representative:
	1. Testate Estate

 Named in Will: YES

 Selected by Majority: YES Waivers Attached YES

OR

* 1. Intestate Estate

 Spouse YES

 Selected by Majority: YES Waivers Attached YES

 Heir Nearest in Degree: YES Waivers Attached YES

1. Affidavit of Heirs attached? YES NO

(**Must be filed to proceed**. 2nd Circuit Form can be found at the 2nd Circuit Judicial Website at: <http://2ndcircuit.leoncountyfl.gov/forms.php>)

1. Non-Exempt Estate Value:

 Less than $75,000 $75,000 or more

**Petition for Summary Administration?**  Yes No (***See §735.203, Fla. Stat.*)**

 Verified? Yes No

 Does Will require Formal Administration? Yes No

 Is the Estate less than $75,000? Yes No

 Did the Decedent die more than 2 years ago? Yes No

**Surviving Spouse:** YES NO

 If YES, Name:

 If YES, has surviving spouse signed the Petition for Summary Administration?

 YES NO

**Names of All Beneficiaries and Relationship to Decedent:**

 **Name Address Relationship Date of Birth (if minor)**

1.
2.
3.
4.

*Use additional sheet if needed.*

**Other Persons or Entities Interested in Probate Proceeding, including Creditors and the Nature of Interest:**

 **Name Address Relationship**

1.
2.
3.
4.

*Use additional sheet if needed.*

**Has Notice of Petition for Summary Administration been given to all beneficiaries and Other Persons or Entities interested, as listed above?** YES NO

**If Notice has NOT been given, have Consents or Waivers been obtained from each, and filed with the Court?** YES NO

**Has a Petition to Determine Homestead been filed with the Court?**

YES NO N/A

***[Make sure Petition specifies whether property is inside municipal limits AND the size of the parcel.]***

 Proposed Order emailed to Judge in Word format? YES NO

**Have you checked with local and State of Florida Unclaimed Property officials to see if there is any unclaimed property belonging to Decedent?** YES NO

**NOTICE TO CREDITORS** (If creditors exist or Decedent is dead less than 2 years):

YES NO N/A

 Date of first publication:

 Claims Period expiration date:

 Claims filed? YES NO If YES, how many?

 All Claims resolved? YES NO

 If NO, creditors’ claims must be resolved. Attach explanation how they will be resolved.

**Proposed Order Admitting Will to Probate?** YES NO N/A

**Proposed Order of Summary Administration?** YES NO

As Attorney for the Personal Representative, I CERTIFY this \_\_\_\_\_\_ day of , 20\_\_\_, that **I have personally reviewed** the foregoing Summary Administration Checklist and that the information provided here is accurate.

 Attorney for Estate

 FL BAR NO.:

 Attorney’s Mailing Address:

 Email Address:

 Telephone No.:

 Facsimile No.:

**CLERK’S NOTES:**

COURT AND/OR EX PARTE CLERK COMMENTS: