**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)**



*Use additional sheet if needed.*

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

**Name Address Relationship**



*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: