

IN RE: Estate of

Case No

Deceased

Division:

**WORKSHEET - FORMAL ADM & APPOINT P.R.  
IN THIS FORM REFERENCE TO A WILL SHALL ALSO INCORPORATE ANY CODICIL WHEN FILED.**

ESTATE: Indicate Yes in the appropriate field(s)

Testate \_\_\_\_\_ Intestate \_\_\_\_\_ Ancillary \_\_\_\_\_

Is the original Will filed w/clerk in \_\_\_\_\_ County? \_\_\_\_\_ [If not yes, indicate where it is located.]

Petitioner's Information: FL Probate R. 5.200 (a) \_\_\_\_\_ YES N/A

Petitioner's Name and Address		
Statement of the petitioner's interest		
Name and Office Address of petitioner's attorney		
Signed by petitioner under penalty of perjury		
NOTES:		

Decedent's Information: FL Probate R. 5.200 (b) \_\_\_\_\_ YES N/A

Decedent's Name and Address		
Last 4 numbers of Social Security		
County and State of domicile		
Place of Death		
Date of Death		
NOTES:		

Death Certificate: FL Probate R. 5.205 and Judicial direction: Differences in the spelling of decedent's name between the death certificate and case style must be cleared in the petition or by affidavit

- No later than 3 months from 1<sup>st</sup> publication of Ntc. To Creditors (DC not required to be filed to admit will or appoint PR)
- Any time prior to the entry of Determination of Beneficiaries or Determination of Homestead YES N/A

Is a Death Certificate filed at this review? {Indicate N/A if not filed, not an notable issue}		
Are there any discrepancies between the death certificate and documents filed? [Indicate N/A when the death certificate is not filed.]		
NOTES:		

Heirs & Beneficiaries and Marital Status: FL Probate R. 5.200[c] - Judicial Direction:

- When the spouse is not listed, the decedent's marital status must be stated within the petition.
- Heirs at law and beneficiaries named in the Will are to be listed.'YES N/A

Marital status or Name and address of surviving spouse?		
Name and address of beneficiaries named in the Will? [Testate]		
Name and address of heirs at law? [Intestate or Persons who would inherit if the Will is not admitted.]		
Provide the relationship of each heir and beneficiary listed?		
Indicate the year of birth for any who are minors?		
NOTES:		

Information about P.R. [May be in Oath of PR when petitioner & proposed PR are the same.]

If yes, please indicate (p) if found petition and (O) if located in oath.

YES N/A

Contain the name and address of P.R. and state they are qualified to serve under FL law?		
State whether the P.R. is a business or an individual?		
If an individual, whether he/she has been convicted of a felony.		
The person is 18 years of age or older.		
The person is mentally and physically able to perform duties.		
Is the person a resident of Florida and, if not, provide their relationship to decedent.		
Whether there is any other person of equal or higher preference to appointment.		
Has Notice been given of the Petition for Administration to all Interested Persons? (intestate)		
NOTES:		

[Mark as N/A if INTESTATE meaning this section does not apply and can be skipped]

Testate ■ Other Information Required in Petition by FL Probate R. 5,200 Q N/A

YES N/A

Identify the Will being offered for Probate and state the petitioner is unaware of any other Wills? [If there are other known Wills, the petition shall state why it is not being probated.]		
Statement whether probate proceedings are pending elsewhere, if known name of PR		
Provide the nature and approximate value of assets of the estate?		
Ancillary Administration: FL Probate Rule 5.470		
Authenticated copy from domiciliary of Petition (provide Affidavit from foreign estate when a Petition is not required), Will, Order Admitting Will and Authority of Domiciliary PR		
Notes] _____		

Last Will & Testament-Lost or Destroyed Will

QJ N/A

YES N/A

Is the Will in possession of the clerk or does it accompany the petition?		
If Lost or Destroyed Will has been submitted for probate, refer to lost will check sheet		
Is the Will self proving? If not, is it proved by Oath of Witness or Proof of Will? Oath or Proof can be signed before any Judge or clerk regardless of the state. If witness signs before a notary or attorney verify commission is in file.		
Is Bond waived in the Will?		
Is person seeking appointment nominated in the Will to serve?		
-If the proposed PR is not nominated by Will, are Consents from beneficiaries/heirs filed?		
NOTES:		

[Mark as N/A if TESTATE estate meaning this section does not apply and can be skipped]

Intestate - Other Information Required In Petition by FL Probate R. 5.200

|~1 N/A

YES N/A

State that after exercise of reasonable diligence and search there are no unrevoked Will or Codicil in which to probate.		
If the petitioner is aware of an unrevoked Will or Codicil, why it is not being admitted to probate		
Statement whether probate proceedings are pending elsewhere, if known name of PR		
Provide the nature and approximate value of assets of the estate?		
Are Consents to the Appointment of the PR filed by a majority of heirs?		
Bond - Are waivers to Bond from all heirs or a Motion to Waive Bond filed?		
Ancillary Administration: FL Probate Rule 5.470		
Authenticated copy from domiciliary of Petition (provide Affidavit from foreign estate when a Petition is not required) and Authority of Domiciliary PR		

NOTES:

Oath Of P.R.:As of Jan. 1,2020 the Oath PR shall be sworn and state

If yes, please indicate (p) if found petition & (0) if located in oath.fclarify if PR is also petitioner) YES N/A

Has reviewed the statutes and understand the qualification of being a PR.		
Is qualified to serve within provisions of sections 733.302,733.303 and 733.304.		
Is 18 years of age or older		
Never been convicted of a felony		
Is mentally and physically able to perform the duties of PR		
Is a resident of Florida or, if not a resident he/she is legally adopted child or parent of decedent, related by lineal consanguinity to decedent or other blood relative		
Will faithfully administer the estate		
Provide the PR's place of residence and post office address, if any		
He/She will promptly file and serve notice on all interested persons any time 1 know that 1 would not be qualified to serve as PR with the reason and date the event occurred		
If the PR changes address he/she will serve notice on all interested persons within 20 days		
Designate a resident agent w/ signed acceptance by agent		
NOTES:		

Order Appointing PR and Letters of Administration

YES N/A

Testate - Does the order admitting the Will contain the correct date of the Will?		
Is Bond to be set by court? [Mark N/A when waived in will or by all heirs]		
Does the proposed Letters of Administration name the correct person as P.R.?		
NOTES:		

Other Notes Related to File | NOTES: