

IN RE: Estate of

Case No

Deceased

Division:

WORKSHEET - SUMMARY ADMINISTRATION

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

- Any time prior to the entry of Determination of Beneficiaries, Determination of Homestead or Order of Summary Administration YES N/A

Is a Death Certificate filed at this review?		
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:

Additional Info to be provided in petition YES N/A

A statement about venue		
Whether domiciliary proceedings are pending in another State or County		
If proceedings are pending, provide name and address of foreign PR		
Describe nature and approximate value of assets		
Separately list or distinguish homestead and exempt assets		
Per F.S. 733 state there is no known or unrevoked Will that would require administration		
State the estate value is less than 75,000 or decedent has been dead for more than 2 years		
Creditors		
State all creditor claims are barred or that after diligent search and inquiry there are no known or easily ascertainable creditors and one of the following:		
The estate is not indebted		
Give name and address of each creditor, nature and amount of debt		
If full payment to the creditor is not provided in the Order of Summary the petition must:		
Show the name of who will pay the debt(s)		
Provide Creditors consent to substitution of assumption of the debt		
The terms of payment and limitation of liability on the person paying the debt		
Has notice of the petition been provided to any creditor that has filed a claim		
NOTES:		

Notice is not required on any heir who will receive full distribution in the proposed schedule of distribution. Any heir and known creditor not joining or consenting to the Petition for Summary Administration must received formal notice.

Does there appear to be any issue regarding notice?		
NOTES:		

[Mark as N/A when the estate is INTESTATE to indicate this section does not apply and can be skipped]

Testate - Other Information Required in Petition by FL Probate R. 5.200 _____ | ~1 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.]		
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 _____ YES N/A

Is the Will in possession of the clerk or does it accompany the petition?		
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.		
Lost or Destroyed Will has been submitted for probate, refer to lost will check sheet		
Has Order Admitting Will been submitted or Order of Summary states the Will "is admitted to probate"?		
The Order admitting the will to probate contains the correct date of the Will?		
NOTES:		

[Mark as N/A when the estate is TESTATE to indicate this section does not apply and can be skipped]

Intestate-Other Information Required in Petition by FL Probate R. 5.200 _____ [~] 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		
Are Consents to Petition for Summary 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:		

Order of Summary Administration _____ YES N/A

Does the order describe the assets and specifically designate who is to receive each asset?		
If there are outstanding debts, does the order make provision for payment of the debt?		
NOTES:		

Other Notes Related to File | NOTES: