

**IN THE CIRCUIT COURT OF THE FIFTH JUDICIAL CIRCUIT,
IN AND FOR LAKE COUNTY, FLORIDA**

AMENDED ADMINISTRATIVE ORDER L-2022-24-A

**RE: MANDATORY USE OF CERTIFICATION CHECKLISTS IN
ESTATE ADMINISTRATIONS IN LAKE COUNTY
(amended as to content of Certification Checklist)**

WHEREAS, Article V, section 2(d) of the Florida Constitution and section 43.26, Florida Statutes, charges the chief judge with the authority to promote the prompt and efficient administration of justice in the courts over which he or she is chief judge; and,

WHEREAS, the Florida Supreme Court, pursuant to Rule 2.215(5) of the Florida Rules of General Practice & Judicial Administration permits the Chief Judge to designate a judge in any court or court division as an Administrative Judge; and,

WHEREAS, the undersigned, the Honorable James R. Baxley, has been designated by the Chief Judge as Administrative Judge for Lake County, pursuant to Rule 2.215(b)(5), Florida Rules of General Practice and Judicial Administration; and,

WHEREAS the fair, efficient, and proper administration of matters of probate is in the interest of the public and the courts of Lake County; and,

WHEREAS, the attached Probate Certification Checklists are intended to provide case filing guidance to litigants, to streamline the processing of cases, and to reduce the number of submission rejections; and

WHEREAS, it is deemed necessary and appropriate for the prompt, effective, and efficient administration of justice within

the Courts of Lake County, Florida; with the advice and consent of the Chief Judge of the Fifth Judicial Circuit and all Lake County Judges who handle probate cases;

It is **THEREFORE ORDERED** as follows:

1. All litigants must utilize the appropriate Certification Checklist(s) attached hereto.
2. All completed Certification Checklist(s) shall be submitted as supporting document(s) to any proposed orders in estate administrations.
3. Litigants must make all necessary election and fill-in all required sections of the applicable Certification Checklist(s). Any submissions without an accompanying Probate Certification Checklist may be rejected.

DONE AND ORDERED in chambers in Tavares, Lake County, Florida, this 14th day of August 2023.



JAMES R. BAXLEY
ADMINISTRATIVE JUDGE,
LAKE COUNTY, FLORIDA

IN THE CIRCUIT COURT IN AND FOR LAKE COUNTY, FLORIDA

CHECKLIST FOR OPENING FORMAL ADMINISTRATION

Estate of: _____ Case No: _____ CP _____

Date of Death: _____ Attorney of Record: _____

Age at Death: _____ Marital Status: _____

Decedent's Residence as Listed on Death Certificate:

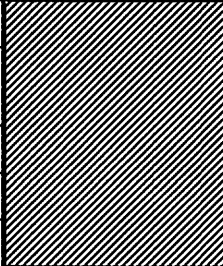
Type of Estate: Testate ☐ Testate/Trust ☐ Intestate ☐ Ancillary ☐

NOTE TO COUNSEL: Please fill out both columns of this checklist completely to assist the court in processing your client's pleading. If you do not provide correct dates in the Date Filed column for each item where a "YES" answer is provided, the checklist will be determined to be incomplete, and the court may deny the petition on that basis.

		Attorney Certification			DATE FILED
		YES	NO	N/A	
1.	Certified Death Certificate Filed?				
2.	Last Will and Testament				
	Original Will filed? (or authenticated copy for ancillary) 5.200(j)				
	Date of Will: _____ Date of Codicil: _____	Fill in information to left			
	If applicable, Notice of Trust # _____ If other than this case, original Will filed in: Court Case # _____ 732.901 Guardianship Case # _____ Caveat # _____ 731.110 <small>[[If an Interested Person Caveator then notify AOR who must serve formal notice before further action may be taken 5.260(f); If a Creditor Caveator, Clerk to send Notice to Caveator when Letters are issued 5.260(e) (unless proof that Notice was already served)]]</small>	Fill in information to the left, if applicable			
	If a copy is filed, has a Petition to Establish Lost Will complying with Rule 5.510 & 5.025 and F.S. 733.207 been filed?				
	Will is self-proved? 732.503, 733.201 If applicable, <input type="checkbox"/> self-proved under law where executed; <input type="checkbox"/> authority provided from other state where executed				
	If not self-proved, an oath of witness is filed? 733.201(2)				
	Properly executed? 732.502				
	If not, proper oath? 733.201(2)/(3)				

		Attorney Certification			DATE FILED	
		YES	NO	N/A		
3. Petition for Administration contains the following information:						
A statement showing interest of Petitioner 5.200(a)						
Petitioner's name and address 5.200(a)						
Petitioner's attorney's name and office address 5.200(a)						
Name of decedent 5.200(b)						
Last known address of decedent 5.200(b)						
Decedent's last four social security numbers 5.200(b)						
Date and place of death of the decedent 5.200(b)						
State and county of decedent's domicile 5.200(b)						
Name, address of surviving spouse, if any, and beneficiaries/heirs 5.200(c)						
Relationship to the decedent 5.200(c)						
Year of birth of any minor beneficiaries 5.200(c)						
Trust beneficiaries included pursuant to 731.201(2)						
If Trust/Trustee (of living trust) is a beneficiary, has Notice of Trust been filed? 736.05055(1)						
Statement of venue 5.200(d)						
A statement as to whether domiciliary proceedings are pending in another state or country 5.200(f)						
Name and address of foreign personal representative and Court issuing letters, if any 5.200(f)						
A statement showing approximate value and nature of assets 5.200(g)						
A statement in an intestate estate that: 5.200(h) <input type="checkbox"/> Each Petitioner is unaware of any unrevoked Wills or Codicils, or <input type="checkbox"/> Why the Wills or Codicils are not being probated						If yes, mark boxes on left
A statement in a testate estate that: 5.200(i)(j) <input type="checkbox"/> Identify all unrevoked Wills and Codicils being presented for probate; and <input type="checkbox"/> Petitioner is unaware of any other unrevoked Wills or Codicils, or : <input type="checkbox"/> A statement of why any other Wills or Codicils are not being probated <input type="checkbox"/> The original of decedent's Will <input type="checkbox"/> is in possession of the Court <input type="checkbox"/> accompanies petition <input type="checkbox"/> an authenticated copy of a Will deposited with or probated in another jurisdiction accompanies the petition 5.200(j)						If yes, mark boxes on left
Establishment and probate of lost or destroyed will 5.510 / 733.207 <input type="checkbox"/> Copy of Will 5.510(b) <input type="checkbox"/> Testimony of witness 5.510(c) / 733.207 <input type="checkbox"/> Notice to those who, but for the Will, would inherit 5.510(d) <input type="checkbox"/> Order states full terms & provisions 5.510(e)						If yes, mark boxes on left

		Attorney Certification			DATE FILED
		YES	NO	N/A	
Ancillary Administration (5.470 / 734.102) To comply with 5.470(a)(1), (b)(1)-(2) the following are needed: <input type="checkbox"/> Authenticated copies: <input type="checkbox"/> Will <input type="checkbox"/> Petition <input type="checkbox"/> Order admitting Will <input type="checkbox"/> Letters <input type="checkbox"/> Formal notice					
		If yes, mark boxes on left			
Signed by petitioner 5.020(a)					
Signed by attorney 5.020(a)					
The verified petition complies with 5.200 and 5.020(e)					
4. PERSONAL REPRESENTATIVE Does the Petition Show Priority of Petitioner to Serve as Personal Representative: 5.200(e)					
Intestate 733.301(a)(b) <input type="checkbox"/> Surviving spouse 733.301(1)(b)1 <input type="checkbox"/> Selected by majority in interest of heirs 733.301(1)(b)2 <input type="checkbox"/> Heir nearest in degree (if more than one applies, court may select the one best qualified) 733.301(1)(b)3 <input type="checkbox"/> Guardian of property of a ward entitled to appointment, or may exercise right to select personal representative 733.301(2) <input type="checkbox"/> If not entitled to preference, notice given 5.201(b)					
		If yes, mark boxes on left			
Testate 733.301(1)(a) <input type="checkbox"/> Personal representative, or successor, nominated by the Will 733.301(1)(a) <input type="checkbox"/> Selected by a majority in interest of persons entitled to the estate 733.301(1)(a)2 <input type="checkbox"/> A devisee under the Will (if more than one applies, court may select the best one qualified) 733.301(1)(a)3 <input type="checkbox"/> If not entitled to preference, notice given or consent 5.201(b)					
		If yes, mark boxes on left			
If Petitioner is a nonresident, does Petition show that he/she is qualified to serve? 733.304 <input type="checkbox"/> Legally adopted child or adoptive parent of the decedent 733.304(1) <input type="checkbox"/> Related by lineal consanguinity to the decedent 733.304(2) <input type="checkbox"/> Spouse, brother, sister, uncle, aunt, nephew, or niece - or someone related by lineal consanguinity to any such person 733.304(3) <input type="checkbox"/> The spouse of a person otherwise qualified to serve 733.304(4)					
		If yes, mark boxes on left			

		Attorney Certification			DATE FILED
		YES	NO	N/A	
5. Bond of Personal Representative					
Bond waived in Will 733.402 (1)					
Bond waived by all interested parties and waivers are attached 5.235(c)					
6. Miscellaneous					
Affidavit of Heirs (pursuant to Administrative Order L-2023-27)					
Notice Regarding Original Will (pursuant to Administrative Order L-2023-28)					
Oath of Personal Representative and Designation of Registered Agent <input type="checkbox"/> Notarized 5.235(a)(3) / 5.320 <input type="checkbox"/> Resident Agent Accepted 5.110(d)		If yes, mark boxes on left			
Checklist for Opening Formal Administration (pursuant to Amended Administrative Order L-2022-24-A)					
Proposed Orders					
7.	Proposed Order Admitting Will/Codicil 5.530(c)				
	Proposed Order Appointing P/R 5.235(a)(1) (may be combined with above Order)				
	Proposed Order provided for Bond, if applicable 5.235(a)(2)				
	Proposed Letters of Administration 5.235(b)				

I certify that I have personally reviewed the foregoing checklist and it is accurate. In making the certification, I have relied upon the information set forth in the pleadings and court filings.

Attorney/Litigant for Estate: _____ Date: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Phone Number: (____) _____ Email address: _____

Attorney/Movant Signature: _____

IN THE CIRCUIT COURT IN AND FOR LAKE COUNTY, FLORIDA

CHECKLIST FOR CLOSING FORMAL ADMINISTRATION

Estate of: _____ Case No: _____ CP _____

Date of Death: _____ Attorney of Record: _____

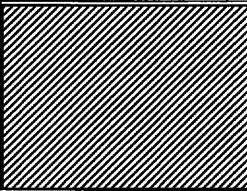
Age at Death: _____ Marital Status: _____

Decedent's Residence as listed on Death Certificate: _____

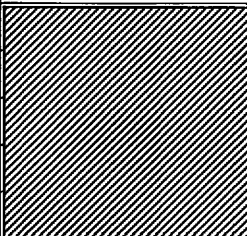
Type of Estate: Testate ☐ Testate/Trust ☐ Intestate ☐ Ancillary ☐

NOTE TO COUNSEL: Please fill out both columns of this checklist completely to assist the court in processing your client's pleading. If you do not provide correct dates in the Date Filed column for each item where a "YES" answer is provided, the checklist will be determined to be incomplete, and the court may deny the petition on that basis.

		Attorney Certification			DATE FILED
		YES	NO	N/A	
1. Notice of Administration Served as Required by 5.240					
Surviving spouse served? 5.240(a)(1)	No surviving spouse: <input type="checkbox"/>				
Proof of Service to Spouse filed?					
If surviving spouse is not served, is waiver signed and filed as required by 5.240(e)?					
All beneficiaries served? 5.240(a)(2)					
Proof of Service to all beneficiaries filed?					
If all beneficiaries are not served, are waivers signed and filed as required by 5.240(e)?					
Trustee of Trust served as described in 733.707(3)? 5.240(a)(3)					
No Trust: <input type="checkbox"/>					
Proof of Service to trustee filed?					
If trustee is not served, are waivers signed and filed as required by 5.240(e)?					
If the trustee is also a personal representative, has each qualified beneficiary of the Trust as defined in 736.0103(16) been served? 5.240(a)(3)					
Trustee is not a personal representative: <input type="checkbox"/>					
Proof of Service to each qualified beneficiary of the Trust filed?					
All persons who may be entitled to exempt property as defined in 732.402 served? 5.240(a)(4)					
None: <input type="checkbox"/>					
Proof of Service to all persons who may be entitled to exempt property served?					

		Attorney Certification			DATE FILED
		YES	NO	N/A	
2. Notice to Creditors as Required by 5.241 and 733.2121					
Notice to Creditors has been served on Agency for Health Care Administration as required by 733.2121(d)? Decedent not 55+: <input type="checkbox"/>					
Proof of Service to Agency for Health Care Administration filed?					
Was Notice to Creditors required to be served on Department of Revenue?					
If so, was Department of Revenue served?					
Proof of Service of Inventory filed?					
All other known creditors have been served and Proof of Service has been filed?					
Proof of Publication of Notice of Creditors filed? 5.241 Week 1 Date Published: _____ Week 2 Date Published: _____					
If Proof of publication is not filed, are claims barred as described in 733.710(1)? Proof of Publication filed: <input type="checkbox"/>					
Verified Statement of Diligent Search for Creditors filed within 4 months of 1 st publication date as required by 5.241(d)? Claims barred: <input type="checkbox"/>					
3. Verified Inventory Filed Within 60 Days from the Issuance of Letters of Administration as Required by 5.340 and 733.604					
Surviving spouse served as required by 5.340(d)? No surviving spouse: <input type="checkbox"/>					
Proof of Service to spouse filed?					
Each Heir at Law in an intestate estate served as required by 5.340(d)? Not intestate: <input type="checkbox"/>					
Proof of Service to each Heir at Law filed?					
Each residuary beneficiary in a testate estate served as required by 5.340(d)? Not testate: <input type="checkbox"/>					
Proof of Service to each residuary beneficiary filed?					
All other interested person(s), who have requested the Inventory in writing, served as required by 5.340(d)? None: <input type="checkbox"/>					
Proof of Service to all other interested person(s) filed?					
4. Notice to Nonresiduary Beneficiaries as Required by 5.340(f) and 733.604					
All nonresiduary beneficiaries have been provided: <input type="checkbox"/> Written notice of their right to receive a written explanation of how the inventory value for each asset distributed to them, or proposed to be distributed to them, was determined; <u>or</u> <input type="checkbox"/> Written notice of their right to receive a copy of an appraisal, if any, of the assets.					
		If yes, mark boxes on left			
5. Creditors 733.705 and 733.710(1) Estate is NOT indebted <input type="checkbox"/>					
Claims are barred as described in 733.710(1)?					
All filed claims are satisfied?					
All filed claims that are not satisfied are settled?					

		Attorney Certification			DATE FILED
		YES	NO	N/A	
	Proof of Service of Objection to Claim has been filed as described in 733.705(2)?				
	No Independent Action has been timely filed as described in 733.705(5)?				
6. Taxes 5.395 and 198.32					
	Affidavit of No FL Tax Due filed as described in 198.32?				
	Notice of Federal Tax Return served on all Interested Parties?				
	Tax Return due nine months from date of death or _____ (date)				
	Federal Estate Tax Closing Letter filed?				
7. Civil Actions and Adversary Proceedings 5.025 and 5.065					
	Any adversary proceedings filed? 5.025				
	If yes, have proceedings been disposed?				
	Any Notice of Civil Actions filed? 5.065				
	If yes, have proceedings been disposed?				
8. Final Accounting Complying with 5.400 , 5.180, and 731.302					
	Final Accounting filed in accordance with 5.400(c)?				
	Were all Interested Persons served? No final accounting filed: <input type="checkbox"/>				
	Any objections to final accounting filed? No final accounting filed: <input type="checkbox"/>				
	All objections resolved? No final accounting filed: <input type="checkbox"/>				
	If Final Accounting was not filed, are waivers by all interested parties filed in accordance with 5.180? Final accounting filed: <input type="checkbox"/>				
9. Petition for Discharge Complying with 5.400 Filed					
	Petition for Discharge signed by the Personal Representative? 5.330(g)				
	Petition for Discharge served on all interested persons? 5.400(c)				
	If Petition for Discharge has not been served, are consents filed?				
	The 30 day time period is expired for filing objections to the discharge?				
	Are there any unresolved objections to the Petition for Discharge?				
Name of Interested Persons served with Petition for Discharge (use add on page for additional persons):					
1.	Waiver () or Date Served (/ /)				
2.	Waiver () or Date Served (/ /)				
3.	Waiver () or Date Served (/ /)				
4.	Waiver () or Date Served (/ /)				
5.	Waiver () or Date Served (/ /)				
6.	Waiver () or Date Served (/ /)				
7.	Waiver () or Date Served (/ /)				

		Attorney Certification			DATE FILED
		YES	NO	N/A	
10.	Plan of Distribution Complying with 5.400(b)(5) Filed				
	Report of Distribution filed as required by 5.400(e)?				
	If Report of Distribution is not filed, are waivers filed as described in 5.180(b)? Proof filed: <input type="checkbox"/>				
11.	Beneficiaries/Heirs				
	Receipts from all beneficiaries/heirs filed? Waivers filed: <input type="checkbox"/>				
12.	Compensation Fees Paid 5.400(b)				
	Petition for Discharge shows compensation paid to attorneys, accountants, personal representative(s) and others employed by the personal representative(s)?				
	Petition for Discharge shows the manner of determining compensation?				
13.	Miscellaneous				
	Petition to Determine Exempt Property filed? 5.406 / 732.402				
	Petition to Determine Homestead Exemption filed? 5.405				
	Petition to Determine Family Allowance filed? 5.407				
	Petition to Determine Beneficiaries filed? 5.385				
	The State of Florida checked for unclaimed property? https://www.fltreasurehunt.org				
	Death Certificate of any beneficiaries filed?				
	Funeral Bill and proof of payment in full filed?				
	Checklist for Closing Formal Administration (pursuant to Amended Administrative Order L-2022-24-A?)				
14.	Proposed Orders				
	Order Determining Exempt Property issued?				
	Order Determining Homestead Exemption issued?				
	Order Determining Family Allowance issued?				
	Order Determining Beneficiaries issued?				
	Proposed Order of Discharge?				

I certify that I have personally reviewed the foregoing checklist and it is accurate. In making the certification, I have relied upon the information set forth in the pleadings and court filings.

Attorney/Litigant for Estate: _____ **Date:** _____

Mailing Address: _____

City: _____ **State:** _____ **Zip:** _____

Phone Number: (_____) _____ **Email address:** _____

Attorney/Movant Signature _____

IN THE CIRCUIT COURT IN AND FOR LAKE COUNTY, FLORIDA

CHECKLIST FOR SUMMARY ADMINISTRATION

Estate of: _____ Case No: _____ CP _____

Date of Death: _____ Attorney of Record: _____

Age at Death: _____ Marital Status: _____

Decedent's Residence as Listed on Death Certificate:

Type of Estate: Testate ☐ Testate/Trust ☐ Intestate ☐ Ancillary ☐

NOTE TO COUNSEL: Please fill out both columns of this checklist completely to assist the court in processing your client's pleading. If you do not provide correct dates in the Date Filed column for each item where a "YES" answer is provided, the checklist will be determined to be incomplete, and the court may deny the petition on that basis.

		Attorney Certification			DATE FILED IN COURT FILE
		YES	NO	N/A	
1.	Certified Death Certificate Filed?				
2.	Last Will and Testament				
	Original Will filed? (or authenticated copy for ancillary) 5.200(j)				
	Date of Will: _____ Date of Codicil: _____	Fill in information to left			
	If applicable, Notice of Trust # _____ If other than this case, original Will filed in: Court Case # _____ 732.901 Guardianship # _____ Caveat # _____ 731.110 <small>[If Interested Person caveat has been filed, the AOR, must serve formal notice on the Caveator before further action can be taken on Petition for Summary 5.260(f); If a creditor-caveator, Clerk must send Notice to Caveator when Letters are issued (or proof of prior notice has been filed) 5.260(e)]</small>	Fill in information to the left, if applicable			
	If a copy is filed, has a Petition to Establish Lost Will complying with 5.510 & 5.025 and 733.207 been filed?				
	Is Will self-proved? 732.503, 733.201 If applicable, <input type="checkbox"/> self-proved under law where executed; <input type="checkbox"/> authority provided from other state where executed	If yes, mark boxes on left			
	If not self-proved, is an oath of witness filed? 733.201(2)				
	Properly executed? 732.502				
	If not, proper oath? 733.201(2) / (3)				

		Attorney Certification			DATE FILED IN COURT FILE
		YES	NO	N/A	
3. Does the Petition for Summary Administration Contain the Following Information?					
A statement showing interest of Petitioner(s) 5.530(a)(1)					
Petitioner's name and address 5.530(a)(1)					
Petitioner's attorney's name and office address 5.530(a)(1)					
Name of decedent 5.530(a)(2)					
Last known address of decedent 5.530(a)(2)					
Decedent's last four social security numbers 5.530(a)(2)					
Date and place of death of the decedent 5.530(a)(2)					
State and county of decedent's domicile 5.530(a)(2)					
Names and addresses of surviving spouse/beneficiaries/heirs 5.530(a)(3)					
Relationship to the decedent 5.530(a)(3)					
Year of birth of any minor beneficiaries 5.530(a)(3)					
Trust beneficiaries included pursuant to 731.201(2)?					
If Trust/Trustee (of living trust) is a beneficiary, has Notice of Trust been filed? 736.05055(1)					
Statement of venue 5.530(a)(4)					
A statement whether domiciliary or principal proceedings are pending in another state or country 5.530(a)(5)					
Name and address of foreign personal representative and Court issuing letters, if any 5.530(a)(5)					
4. Has the Court Been Provided Information Relative to Existence of a Will?					
A statement in an intestate estate that: 5.530(a)(10) <input type="checkbox"/> Each Petitioner is unaware of any unrevoked Wills or Codicils, or <input type="checkbox"/> Why the Wills or Codicils are not being probated					If yes, mark boxes on left
A statement in a testate estate that: 5.530(a)(11) <input type="checkbox"/> Identify all unrevoked Wills and Codicils being presented for probate; and <input type="checkbox"/> Petitioner is unaware of any other unrevoked Wills or Codicils, or : <input type="checkbox"/> A statement of why any other Wills or Codicils are not being probated <input type="checkbox"/> The original of decedent's Will <input type="checkbox"/> is in possession of the Court <input type="checkbox"/> accompanies petition <input type="checkbox"/> an authenticated copy of a Will deposited with or probated in another jurisdiction accompanies the petition 5.200(j)					

Revised August 14, 2023

		Attorney Certification			DATE FILED IN COURT FILE
		YES	NO	N/A	
6. Is the Petition Filed By:					
<input type="checkbox"/> Beneficiary <input type="checkbox"/> Heir at Law <input type="checkbox"/> Person nominated as personal representative 735.203(1)		Fill in applicable information to the left			
7. Is the Petition Properly Executed? 735.203					
<input type="checkbox"/> Verified 5.530(a) / 735.203(1) <input type="checkbox"/> Signed by surviving spouse 735.203(1) <input type="checkbox"/> Signed by Heirs at Law or beneficiaries who are <i>sui juris</i> 735.203(1) <input type="checkbox"/> Signed by guardian of any heir/beneficiary who is not <i>sui juris</i> /incapacitated 735.203(2)(b) <input type="checkbox"/> Signed by person(s) described by 735.203(2)(a) or (c) <input type="checkbox"/> Signed by attorney 5.020(a)		Fill in applicable information to the left			
8. Miscellaneous					
Has formal notice been served on any heir, beneficiary, or creditor not joining or consenting to the Petition? 5.530(b) / 735.203(1)					
Has Funeral Bill and Proof of Payment-in-full been filed?					
Has Proof of Payment-in-full for all Doctor(s) and Hospital(s) been filed?					
Affidavit of Heirs (pursuant to Administrative Order L-2023-27					
Notice Regarding Original Will (pursuant to Administrative Order L-2023-28					
Checklist for Summary Administration (pursuant to Amended Administrative Order L-2022-24-A)					
9 Proposed Orders					
Proposed Order Admitting Will/Codicil 5.530(c)					
Proposed Order of Summary Administration 5.530(a)(12)(d) – <input type="checkbox"/> Specific as to assets and to whom distributed					

I certify that I have personally reviewed the foregoing checklist and it is accurate. In making the certification, I have relied upon the information set forth in the pleadings and court filings.

Attorney/Litigant for Estate: _____ Date: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Phone Number: (____) _____ Email address: _____

Attorney/Movant Signature: _____

IN THE CIRCUIT COURT IN AND FOR LAKE COUNTY, FLORIDA

CHECKLIST FOR DETERMINING HOMESTEAD STATUS OF REAL PROPERTY IN FORMAL AND SUMMARY ADMINISTRATION

Estate of: _____ Case No: _____ CP _____

Date of Death: _____ Attorney of Record: _____

Age at Death: _____ Marital Status: _____

Decedent's Residence as Listed on Death Certificate:

Type of Estate: Testate ☐ Testate/Trust ☐ Intestate ☐

NOTE TO COUNSEL: Please fill out both columns of this checklist completely to assist the court in processing your client's pleading. If you do not provide correct dates in the Date Filed column for each item where a "YES" answer is provided, the checklist will be determined to be incomplete, and the court may deny the petition on that basis.

		Attorney Certification			DATE FILED
		YES	NO	N/A	
1.	Certified Death Certificate Filed?				
2.	Last Will and Testament				
	Original Will filed?				
	Date of Will: _____ Date of Codicil: _____	Fill in information to left			
	If applicable: Notice of Trust # _____ Deposited Will # _____ 732.901 Guardianship Case # _____ Caveat # _____ 731.110 [If caveat has been filed, notify attorney, must serve formal notice on the Caveator before further action can be taken on Petition for Summary 5.260(f); If a creditor-send Notice to Caveator when Letters are issued 5.260(e)]	Fill in information to the left, if applicable			
	If a copy is filed, has a Petition to Establish Lost Will complying with 5.510 & 5.025 and 733.207 been filed?				
	Is Will self-proved? 732.503, 733.201 If applicable, <input type="checkbox"/> self-proved under law where executed; <input type="checkbox"/> authority provided from other state where executed				
		If yes, mark boxes on left			

		Attorney Certification			DATE FILED
		YES	NO	N/A	
	If not self-proved, is an oath of witness filed? 733.201(2)				
	Properly executed? 732.502				
	If not, proper oath? 733.201(2) / (3)				
3.	Does the Petition for Determining Homestead Status of Real Property Contain the Following Information? FPR 5.405(b)				
	(1) the date of decedent's death				
	(2) the county of the decedent's domicile at the time of death;				
	(3) the name of the decedent's surviving spouse/descendants; and whether they are minor children, identified with name and year of birth;				
	(4) a Legal description of the property owned and resided on by the decedent;				
	Whether the real property constituted the protected homestead of the decedent; 5.405(c)				
	Formal Notice or Consent by interested parties 5.040/5.041				
4.	List of Beneficiaries:				
5.	List of Creditors:				
6.	Intestate: F.S.732.401(1)	YES	NO	N/A	CONFIRMED
	Does the Proposed Order provide for a Life Estate for Spouse?				
	Testate: F.S.732.4015(1) Is there a Surviving Spouse or minor child?	YES	NO	N/A	CONFIRMED

		Attorney Certification			DATE FILED
		YES	NO	N/A	
7. For Formal Administration only: Verified Statement Regarding Creditors filed. Notice to Creditors to AHCA (>55yo)		YES	NO	N/A	CONFIRMED
8. Is the Petition Properly Executed?					
<input type="checkbox"/> Verified <input type="checkbox"/> Signed by Petitioner <input type="checkbox"/> Signed by attorney 5.020(a)		Fill in applicable information to the left			
9. Miscellaneous					
Has formal notice been served on any heir, beneficiary, or creditor not joining or consenting to the Petition?					
If testate, and Will directs sale—Loses Homestead exemption See <u>Price</u> 513 So. 2d 767; <u>Knadle</u> 686 So. 2d 681					
Checklist for Determining Homestead Status of Real Property (pursuant to Amended Administrative Order L-2022-24-A)					
10. Proposed Orders					
Proposed Order Determining Homestead Status of Real Property. <input type="checkbox"/> Shall describe real property (includes complete legal description); <input type="checkbox"/> Shall determine whether real property constituted homestead of decedent; <input type="checkbox"/> Identifies by name the person(s) entitled to homestead; <input type="checkbox"/> Defines the interest of person(s) receiving the protected homestead; <input type="checkbox"/> Finds that the homestead property descended to or was validly devised.		Fill in applicable information to the left			

I certify that I have personally reviewed the foregoing checklist and it is accurate. In making the certification, I have relied upon the information set forth in the pleadings and court filings.

Attorney/Litigant for Estate: _____ **Date:** _____

Mailing Address: _____

City: _____ **State:** _____ **Zip:** _____

Phone Number: (____) _____ **Email address:** _____

Attorney/Movant Signature: _____