## IN THE CIRCUIT COURT IN AND FOR LAKE COUNTY, FLORIDA

## **CHECKLIST FOR SUMMARY ADMINISTRATION**

Estate of:		Case No:	i		_CF	)
Date of Death: Attorn	ney of Record	:				
Age at Death: Marita	I Status:					
Decedent's Residence as Listed						
Type of Estate: Testate ☐ Te	estate/Trust [	] Intestate		Α	ncill	агу 🗌
NOTE TO COUNSEL: Please fill out be court in processing your client's please filled column for each item where a "Y to be incomplete, and the court may determine the court ma	ding. <u>If you do</u> YES" answer is	not provide oprovided, the	che	ct d	<u>ates</u>	in the Date_
				torn ifica	ey tion	
			YES	NO	N/A	DATE FILED IN COURT FILE
. Certified Death Certificate Filed	?					
. Last Will and Testament						
Original Will filed? (or authenticated copy	for ancillary) 5.	200(j)				
Date of Will: Da	ate of Codicil:			Fill in matio	n to	
If applicable, Notice of Trust #						
If other than this case, orig	inal Will filed in:					
Court Case # 732		732.901	Fill in			
Guardianship#			information to the left, if applicable			
Caveat #		731.110			ble	
[If Interested Person caveat has been on the Caveator before further action 5.260(f); If a creditor-caveator, Clerk r Letters are issued (or proof of prior no	can be taken on Petition  must send Notice to Ca	on for Summary eveator when				
If a copy is filed, has a Petition to Establis 5.510 & 5.025 and 733.207 been filed?	sh Lost Will comp	lying with				
Is Will self-proved? 732.503, 733.201						
If applicable,  self-proved under law where executed;		lf y	es, m	ark		
authority provided fro		nere executed	box	es on	left	
If not self-proved, is an oath of witness file	ed? 733.201(2)					
Properly executed? 732.502						
If not, proper oath? 733.201(2) / (3)						

		Attorney Certification			
		YES	NO	N/A	DATE FILED IN COURT FILE
3.	Does the Petition for Summary Administration Contain t	he F	ollo	win	g 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 Exi	ister	ıce	of a	Will?
	A statement in an <u>intestate estate</u> that: 5.530(a)(10)				
	☐ Each Petitioner is unaware of any unrevoked Wills or Codicils, or ☐ Why the Wills or Codicils are not being probated		es, m	ark	
			es on		
	A statement in a <u>testate estate</u> that: 5.530(a)(11)				
	☐ Identify all unrevoked Wills and Codicils being presented for			<u> </u>	
	probate; <u>and</u> Petitioner is unaware of any other unrevoked Wills or Codicils, <u>or</u> :  A statement of why any other Wills or Codicils are not being probated  The original of decedent's Will  () is in possession of the Court () accompanies petition () 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			

			torn ifica		
		YES	NO	N/A	DATE FILED IN COURT FILE
	Establishment and probate of lost or destroyed will 5.510 / 733.207  Copy of Will 5.510(b) Testimony of witness 5.510(c) / 733.207 Notice to those who, but for the Will, would inherit 5.510(d) Order states full terms & provisions 5.510(e)  Ancillary Administration 5.470 / 734.102		es, ma		
	☐ Authenticated copies: (_) Will (_) Petition (_) Order admitting will (_) Letters 5.470(a)(1) ☐ Formal notice 5.470(b)(1)/(2)		es, ma		
5.	Does the Petition Contain Facts that Entitle Decedent's Est Administration? In a testate estate, that the decedent's Will does not direct	tate	to S	umn	nary
	administration as required by 5.530(a)(6) / 733 and 735.201(1)  That the value of the entire estate subject to administration in this state, less the value of property exempt from claims of creditors:  Does not exceed \$75,000 5.530(a)(7) / 735.201(2) or  Decedent has been dead for more than 2 years 735.201(2) [5.530(a)(7) (with respect to persons dying after 7/1/89) /		es, m		
	733.710(1)]  A schedule of all assets of the estate and their estimated value 5.530(a)(8)  [separately designating homestead and exempt property]  A statement in regard to the indebtedness of the estate 5.530(a)(9)  That all creditors' claims are barred; 5.530(a)(9)(A) or				
	□ A statement that a diligent search and reasonable inquiry has been made for known or ascertainable creditors; 5.530(a)(9)(B) and □ □ That the estate is not indebted 5.530(a)(9)(B)(i) □ Name and address of each creditor, nature of debt, amount of debt, and when debt is due 5.530(a)(9)(B)(ii)  If provision for payment of debt has been made other than for full payment in proposed order of distribution, the following shall be shown:  The name of the person who will pay the debt. The creditor's written consent for substitution or assumption of the debt by another person. The amount to be paid if the debt has been compromised. The terms for payment by any limitations on the liability if the person paying the debt 5.530(a)(9)(B)(ii)		es, ma		
	A proposed schedule of distribution of all assets and the person to whom each asset is to be distributed 5.530(a)(12) / 735.206				

			Attorney Certification				
		,	YES	NO	N/A	DATE FILED IN COURT FILE	
	Is the Petition Filed By:						
	☐ Beneficiary ☐ Heir at Law		•	Fill in plical ormat	ble		
	☐ Person nominated as personal representative 735.203(1)	)	to	the !	eft		
·.	Is the Petition Properly Executed? 735.203						
	☐ Verified 5.530(a) / 735.203(1)			Fill in			
	☐ Signed by surviving spouse 735.203(1)		info	ormat	ion		
	☐ Signed by Heirs at Law or beneficiaries who are <i>sui juris</i> 735.203(1)		το	the l	eπ		
	☐ Signed by guardian of any heir/beneficiary who is not sui j /incapacitated 735.203(2)(b)	iuris					
	☐ Signed by person(s) described by 735.203(2)(a) or (c)						
	☐ Signed by attorney 5.020(a)						
3.	Miscellaneous						
	Has formal notice been served on any heir, beneficiary, or credipoining or consenting to the Petition? 5.530(b) / 735.203(1)	itor not					
İ	Has Funeral Bill and Proof of Payment-in-full been filed?						
ļ	Has Proof of Payment-in-full for all Doctor(s) and Hospital(s) be	en filed?					
	Affidavit of Heirs (pursuant to Administrative Order L-2023-27						
- 1	Notice Regarding Original Will (pursuant to Administrative Orde L-2023-28	er					
	Checklist for Summary Administration (pursuant to Amended Administrative Order L-2022-24-A)	j					
٩l	Proposed Orders						
ړ <del>ر</del>	Proposed Order Admitting Will/Codicil 5.530(c)						
- 1	Proposed Order of Summary Administration 5.530(a)(12)(d) − ☐ Specific as to assets and to whom distributed						
rt /	certify that I have personally reviewed the foregoing the certification, I have relied upon the informatifilings.  Attorney/Litigant for Estate:	ation set	for	th i Da	n th		
	Mailing Address:						
•		4					
	City: Sta	te:		Zip	:		