

IN THE CIRCUIT COURT IN AND FOR ORANGE/OSCEOLA COUNTY, FLORIDA

CHECKLIST FOR OPENING FORMAL ADMINISTRATION
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Estate of: _____ Case No: _____

Date of Death: _____ Attorney of Record: _____

Age at Death: _____ Marital Status: _____

Decedent’s Residence as Listed on Death Certificate:

Type of Estate: Testate 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 incomplete and the court will deny the petition on that basis.

	Attorney Certification			CONFIRMATION BY COUNSEL
	YES	NO	N/A	DATE FILED
1. Certified Death Certificate Filed?				
2. Last Will and Testament				
Original Will filed? <i>(or authenticated copy for ancillary)</i> 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 an heir-notify attorney, must serve formal notice before further action may be taken 5.260(f); If a creditor-send Notice to Caveator when Letters are issued 5.260(e)]</small>	Fill in information to the left, if applicable			
If a copy is filed, a petition to establish lost will complying with Rule 5.510 & 5.025 and F.S. 733.207 has 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)				

“Exhibit A”

	Attorney Certification			CONFIRMATION BY COUNSEL
	YES	NO	N/A	DATE FILED
Properly executed? 732.502				
If not, proper oath? 733.201(2)/(3)				
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)				
Signed by petitioner 5.020(a)				
Signed by attorney 5.020(a)				
The verified petition complies with 5.200 and 5.020(e)				
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 () is in possession of the Court () accompanies petition () an authenticated copy of a will deposited with or probated in				

“Exhibit A”

	Attorney Certification			CONFIRMATION BY COUNSEL
	YES	NO	N/A	DATE FILED
733.304(3) <input type="checkbox"/> The spouse of a person otherwise qualified to serve 733.304(4)				
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				
Date of filing of Notice of Filing of Original Will as required in every case pursuant to Administrative Order No. 2021-24 (except ancillary administration cases)				
Affidavit of Heirs only if intestate – must be in the form required by Administrative Order No. 2022-08				
Proposed Order Admitting Will/Codicil 5.530(c)				
Proposed Order Appointing P/R 5.235(a)(1) (may be combined with Order Admitting Will)				
Proposed Order provided for Bond, if applicable 5.235(a)(2)				
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)				
Proposed Letters of Administration 5.235(b)				

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

Signature of Attorney for Estate: _____

Printed Name of Attorney for Estate: _____

Date: _____ **Phone Number:** (_____) _____

Mailing Address: _____

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

Email address: _____