

ATTACHMENT 2 TO SRCAD 2018-02

IN THE CIRCUIT COURT IN AND FOR SANTA ROSA COUNTY, FLORIDA

CHECKLIST FOR SUMMARY ADMINISTRATION

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 ☐

	Attorney Certification			Review of Attorney Certification
	YES	NO	N/A	CONFIRMED
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 # _____ Deposited Will # _____ 732.901 Guardianship # _____ Caveat # _____ 731.110 <small>[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)]</small>	Fill in information to the left, if applicable			
If a copy is filed, a petition to establish lost will complying with 5.510 & 5.025 and 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 yes, mark boxes on left			
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			Review of Attorney Certification
		YES	NO	N/A	CONFIRMED
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)					
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					If yes, mark boxes on left

		Attorney Certification			Review of Attorney Certification
		YES	NO	N/A	CONFIRMED
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			
6. 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)					
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 for Estate: _____ Date: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Phone Number: (____) _____

Email address: _____