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: Testate Type of Estate: Intestate Ancillary Attorney Review of Certification 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) Fill in information Date of Will: _____ Date of Codicil: _____ to left If applicable, Notice of Trust # Deposited Will # ______ 732.901 Fill in information Guardianship # to the left, if applicable Caveat # [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)] 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, \square self-proved under law where executed; If yes, mark authority provided from other state where executed 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)?			· u			
	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 <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		yes, ma	21 12			
	A statement in a <u>testate estate</u> that: 5.530(a)(11)						
	☐ Identify all unrevoked wills and codicils being presented for probate; and ☐ Petitioner is unaware of any other unrevoked wills or codicils, or: ☐ 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, maxes on				
	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		yes, m	- rec			

		Attorney Certification			Review of Attorney Certification
		YES	NO	N/A	CONFIRMED
	☐ 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				
	☐ 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 Estate to	Sum	mar	y Ad	ministration?
	In a <u>testate estate</u> , that the decedent's will does not direct 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) / 733.710(1)]	If yes, mark boxes on left			
	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. 	1	yes, mark oxes on left		
	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)				
	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				
6.	Is the Petition Filed By:				T
	☐ Beneficiary ☐ Heir at law ☐ Person nominated as personal representative 735.203(1)	in	Fill in pplication formation to the	ble tion	

			Attorney Certification		Review of Attorney Certification			
		YES	NO	N/A	CONFIRMED			
7.	Is the Petition Properly Executed? 735.203							
	☐ Verified 5.530(a) / 735.203(1)							
	☐ Signed by surviving spouse 735.203(1)		Fill in					
	☐ Signed by heirs at law or beneficiaries who are <i>sui juris</i> 735.203(1)							
	Signed by guardian of any heir/beneficiary who is not <i>sui juris</i> /incapacitated 735.203(2)(b)	int	pplical format o the le	ion				
	☐ Signed by person(s) described by 735.203(2)(a) or (c)							
	☐ Signed by attorney 5.020(a)							
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)	ıg						
	Proposed Order Admitting Will/Codicil 5.530(c)							
	Proposed Order of Summary Administration 5.530(a)(12)(d) ☐ 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.								
A	ttorney for Estate:		_ [ate:				
N	Iailing Address:							
City: State:			Zip:					
	hone Number: ()							
E	mail address:							