## ATTACHMENT 1 TO SRCAD 2018-02 IN THE CIRCUIT COURT IN AND FOR SANTA ROSA COUNTY, FLORIDA

	CHECKLIST FOR OPENING FORMAL ADMINISTRATION							
I	Estate of:	lo: _						
Ι	Date of Death: Attorney of Record:							
A	Age at Death: Marital Status:							
	Decedent's Residence as Listed on Death Certificate:							
- ]	Type of Estate:  Testate    Intestate	Anci	illary	7				
		Cer	ttorn tifica	tion	Review of Attorney Certification			
		YES	NO	N/A	CONFIRMED			
1.	Certified Death Certificate Filed?							
	Last Will and TestamentOriginal Will filed? (or authenticated copy for ancillary)5.200(j)							
	Date of Will: Date of Codicil:	Fill in	infori to left	nation				
	If applicable, Notice of Trust #							
	Deposited Will # 732.901							
	Guardianship #		Fill in information to the left, if applicable					
	Caveat # 731.110	if a						
	[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)]	ı						
	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, $\Box$ self-proved under law where executed;							
	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)							
z	Petition for Administration contains the following information	n۰						
	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)							

	Attorney Certification YES NO N/A			Review of Attorney Certification
Last known address of decedent 5.200(b)	YES	NO	N/A	CONFIRMED
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 <i>intestate estate</i> that: 5.200(h)				
<ul> <li>Each Petitioner is unaware of any unrevoked wills or codicils, or</li> <li>Why the wills or codicils are not being probated</li> </ul>	If yes	, mark on left		
A statement in a testate estate that: 5.200(i)(j)				
<ul> <li>Identify all unrevoked wills and codicils being presented for probate; and</li> <li>Petitioner is unaware of any other unrevoked wills or codicils, or:</li> <li>A statement of why any other wills or codicils are not being probated</li> <li>The original of decedent's will         <ul> <li>(_) is in possession of the Court</li> <li>(_) accompanies petition</li> <li>(_) an authenticated copy of a will deposited with or probated in another jurisdiction accompanies the petition 5.200(j)</li> </ul> </li> </ul>		, mark on left		
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)	If yes	, mark on left		
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)	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)				

		Attorney Certification			Review of Attorney Certification
		YES	NO	N/A	CONFIRMED
4.	PERSONAL REPRESENTATIVE Does the Petition Show Priority of Petitioner to Serve as Person	nal I	Repr	esen	tative: 5.200(e)
	<u>Intestate</u> 733.301(a)(b)				
	Surviving spouse 733.301(1)(b)1		1		
	$\Box$ Selected by majority in interest of heirs 733.301(1)(b)2				
	<ul> <li>Heir nearest in degree (if more than one applies, court may select the one best qualified) 733.301(1)(b)3</li> <li>Guardian of property of a ward entitled to appointment, or may exercise right to select personal representative 733.301(2)</li> <li>If not entitled to preference, notice given 5.201(b)</li> </ul>	If yes,	If yes, mark boxes on left		
	<u>Testate</u> 733.301(1)(a)				
	Personal representative, or successor, nominated by the will				
	<ul> <li>733.301(1)(a)</li> <li>□ Selected by a majority in interest of persons entitled to the estate 733.301(1)(a)2</li> <li>□ A devisee under the will (if more than one applies, court may select the best one qualified) 733.301(1)(a)3</li> </ul>		, mark on left		
	$\Box$ If not entitled to preference, notice given or consent 5.201(b)				
	If Petitioner is a nonresident, does Petition show that he/she is qualified to serve? 733.304				
	<ul> <li>Legally adopted child or adoptive parent of the decedent 733.304(1)</li> <li>Related by lineal consanguinity to the decedent 733.304(2)</li> <li>Spouse, brother, sister, uncle, aunt, nephew, or niece - or someone related by lineal consanguinity to any such person 733.304(3)</li> <li>The spouse of a person otherwise qualified to serve 733.304(4)</li> </ul>	If yes, mark boxe on left			
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				
	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)				
	Oath of Personal Representative and Designation of Registered Agent				
	□ Notarized 5.235(a)(3) / 5.320 □ Resident Agent Accepted 5.110(d)		, mark on left		
	Proposed Letters of Administration 5.235(b)				
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## 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:			