CHECKLIST FOR CLOSING FORMAL ADMINISTRATION ESTATE

This Checklist **must** be completed and e-filed with your proposed Order. An Attorney **shall** certify in writing that she/he has reviewed both the checklist and supporting documents prior to submission. Completing and submitting the Checklist does not obviate any additional obligation imposed by rule or statute. If the submission is deficient, you shall receive a single email identifying the deficiency for correction. Pending correction, the file **will not** move forward.

Estate of _____ **Probate Case No.:** _____

Type of Estate: ☐ **Testate** ☐ **Intestate** ☐ **Ancillary**

Judicial Administration Reviewed:		**Attorney Certification**			**DIN#**
		YES	**NO**	**N/A**	
	Petition for Discharge Complying with 5.400 filed?	☐	☐	☐	
	Petition served on all interested persons?	☐	☐	☐	
	The 30-day time period expired ____? Waivers filed _____?	☐	☐	☐	
	Any unresolved objections _____?	☐	☐	☐	
	Compensation for Fees Paid 5.400(b)? Attorney's comp. ___? P.R. comp. ___? Orders entered ___?	☐	☐	☐	
	All required Notice to Creditors & Interested Parties Given?	☐	☐	☐	
	Notice of Administration served as required by R5.240 and/or waivers ___ & proofs filed _____	☐	☐	☐	
	Notice to Creditors served ___ on DOR ___ on AHCA age 55+ ____ F.S. 733.2121?	☐	☐	☐	
	Proof of Publication of Notice to Creditors filed. R.5.241? or claims barred ____ ?	☐	☐	☐	
	Verified diligent search Statement Regarding Creditors filed. R. 5.241 ____? Or claims barred _____ ?	☐	☐	☐	
	Verified Inventory filed as required by F.S. 733.604?	☐	☐	☐	
	All Proofs of service of Inventory filed as required by R 5.340?	☐	☐	☐	
	Creditors?				
	Estate in NOT indebted ___? Claims are barred ___?	☐	☐	☐	
	All filed Claims satisfied ___ or settled ____? F.S. 733.705 If not, attach explanation	☐	☐	☐	
	Plan of Distribution complying with 5.400(b)(5) filed?	☐	☐	☐	
	Report of Distribution filed ___? If not, are Waivers filed ___?	☐	☐	☐	
	Receipts from beneficiaries/heirs filed ___? If not, are Waivers filed ___?	☐	☐	☐	

Judicial Administration Reviewed:		Attorney Certification			DIN#
		YES	NO	N/A	
	Affidavit of No FL tax due filed ___ F.S. 198.312? Non taxable certificate filed ____ F.S. 198.26?	☐	☐	☐	
	Notice of Federal Tax Return filed and served? _____R 5.395 Tax Return due date is _____?	☐	☐	☐	
	Federal Estate Tax Closing Letter filed?	☐	☐	☐	
	Civil Actions and Adversary Proceedings?	☐	☐	☐	
	Any adversary proceedings filed R5.025? ___ If yes, have proceedings been disposed? ___	☐	☐	☐	
	Any Notice of Civil Action filed R.5.065? ___ If yes, have proceedings been disposed? ___	☐	☐	☐	
	Final Accounting?				
	Final Accounting filed? _____ or R 5.180 waivers by ALL interested persons filed? _____	☐	☐	☐	
	Any objections to final accounting filed? _____ All objections resolved? _____	☐	☐	☐	
	Final Accounting served on ALL interested persons ____ Or R 5.180(b) waivers filed? _____	☐	☐	☐	

Please complete the Certification

The undersigned Attorney certifies that she/he has reviewed the information necessary to support the Petition for Discharge. The Attorney further certifies that all required information was previously, or concurrently filed, with the Petition. The Attorney acknowledges that the Petition will not be reviewed by the Court until the necessary information has been accepted via the **OKALOOSA, PROBATE-GUARDIANSHIP ONLY** section of the Florida E-Filing Portal. The Attorney further acknowledges that a hearing may be required to process the Petition.

Attorney for Personal Representative: _____ **Dated:** _____

Phone Number: _____

Email Address: _____