

CHECKLIST FOR OPENING 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 _____

Deposited Will Case No.: _____

Type of Estate: ☐ Testate

☐ Intestate

☐ Ancillary

Judicial Administration Reviewed:		Attorney Certification			DIN#
		YES	NO	N/A	
	Death Certificate Filed?	☐	☐	☐	
	Last Will and Testament:	☐	☐	☐	
	Original Will filed? (or authenticated copy for ancillary) – Rule 5.200	☐	☐	☐	
	If copy is filed, a petition to establish lost will complying with F.S. 733.707 and Rule 5.510 & 5.025 has been filed?	☐	☐	☐	
	Will is self-proved (F.S. 732.503, 733.201)?	☐	☐	☐	
	If not self-proved, an Oath of Witness is filed (733.201(2))?	☐	☐	☐	
	Petition for Administration:				
	The verified petition complies with Rule 5.200 and 5.020(e)?	☐	☐	☐	
	Personal Representative Preference:				
	PR Named in Will	☐	☐	☐	
	Selected by Majority	☐	☐	☐	
	Spouse of PR	☐	☐	☐	
	If no Spouse, Notice given – Rule 5.201?	☐	☐	☐	
	Guardian of property of Ward	☐	☐	☐	
	Bond:				
	Bond waived in Will – F.S. 733.402(1)?	☐	☐	☐	
	Bond waived by all interested parties and waivers are attached?	☐	☐	☐	
	Motion to Waive with approximate value of probate assets filed?	☐	☐	☐	
	Required Notice:				
	Has been given to all interested parties?	☐	☐	☐	

	Waivers are attached?	☐	☐	☐	
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Please complete the Certification

The undersigned Attorney certifies that she/he has reviewed the information necessary to support the Petition for Formal Administration. 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:_____