

CHECKLIST FOR SUMMARY 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 Summary Administration:				
	The verified petition complies with Rule 5.200 and 5.020(e)?	☐	☐	☐	
	All assets and their values listed in Petition – Rule 5.530(a)?	☐	☐	☐	
	Non-Exempt Assets less than \$75,000.00 ____ or Deceased 2 years or more ____	☐	☐	☐	
	Proposed distribution of assets included 5.530(12)?	☐	☐	☐	
	Petition signed by spouse ____ beneficiaries ____ or consents ____	☐	☐	☐	
	Creditors?				
	Estate is NOT indebted ____ Claims are barred ____				
	Diligent search and inquiry for creditors done F.S. 735.206(2)?	☐	☐	☐	
	Notice given to Agency for Health Care Admin. Age 55+ F.S. 733.2121?	☐	☐	☐	
	Provisions for payment of creditors made to extent of assets?	☐	☐	☐	
	Affidavit of No FL Estate Tax Due filed ____ or Nontaxable certificate filed ____?	☐	☐	☐	
	Required Notice:				
	Has been given to all interested parties?	☐	☐	☐	
	Waivers are attached?	☐	☐	☐	

	An Affidavit of Heirs has been filed if intestate case?	☐	☐	☐	
	Proposed Orders to be entered by Judge e-filed through E-portal Order Admitting Will ☐ Order of Summary Admin. ☐ Order Determining Homestead ☐ Order Determining Exempt Prop. ☐				

Please complete the Certification

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