

IN THE CIRCUIT COURT OF THE SEVENTEENTH
JUDICIAL CIRCUIT, IN AND FOR BROWARD COUNTY, FLORIDA
PROBATE DIVISION

CHECKLIST FOR PETITION FOR FORMAL ANCILLARY ADMINISTRATION

This Checklist must be completed and e-filed with your Petition. Review and sign the applicable certification clause at the end of the checklist prior to submitting it with your Petition. If any of the items below are not checked, please complete “Certification B”. Completing and e-filing this Checklist does not obviate any additional obligations imposed by rule or statute.

HEARING:

☐	At the time of filing this Petition, I intend to pursue this Petition on ex-parte, motion, or special set calendar.
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OR

☐	At the time of filing this Petition, I intend to have this Petition submitted to the Judge without a hearing.
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CASE NUMBER: PRC - ____ - _____ In Re Estate of: _____

☐	A copy of the decedent’s death certificate was filed.
☐	The Petition includes a statement showing proper venue.
☐	The Petitioner filed an Affidavit Regarding Criminal History ¹ (form available on the Seventeenth Judicial Circuit Court’s website).
☐	This is an intestate estate and the Petitioner has filed an Affidavit of Heirs (form available on the Seventeenth Judicial Circuit’s Webpage);
OR	OR
☐	This is a testate estate.
☐	The Petition is verified.
☐	The Petition is signed by the interested person.
☐	The Petition is signed by the attorney of record.
☐	<u>The Petitioner requests Letters for the following individual:</u> If this is a testate estate: ☐ A personal representative specifically designated in the decedent’s will to

¹ Please note that trust companies, banks, as well as other qualified corporations identified in section 733.305, Florida Statutes, are not required to file this affidavit.

☐	administer Florida property; OR ☐ The domiciliary personal representative of the decedent's estate who is qualified to act in Florida; OR ☐ The alternate or successor personal representative named in the will who is qualified to act in Florida; OR ☐ A personal representative qualified to act in Florida who is selected by those entitled to the majority interest of the Florida property. If this is an intestate estate: ☐ The domiciliary personal representative of the decedent's estate who is qualified to act in Florida; OR ☐ A personal representative who has order of preference for appointment as prescribed by the Florida Probate Code.
☐	The proposed personal representative has preference of appointment in accordance with the Florida Probate Code. If the proposed personal representative does not have preference, the Petitioner has filed the renunciations or death certificates that demonstrate the proposed personal representative is entitled to appointment.
☐	The Petitioner is not a convicted felon and the Petitioner is a Florida resident. If the Petitioner is not a Florida resident, the Petitioner is related to the decedent within the statutorily required degree.
☐	The Petitioner filed authenticated copies, as defined in 28 U.S.C. 1738, of the domiciliary proceedings. If testate, the authenticated copies of the domiciliary foreign proceeding include a petition for probate, an order admitting the will and / or codicils to probate, and the authority of the personal representatives. For intestate proceedings, the authenticated copies include the domiciliary foreign petition for administration and the authority of the personal representative to act.
☐	The Petition includes the names and addresses of the beneficiaries and their relationship to the decedent. If any beneficiary is a minor, the year of birth is included.
☐	The Petition includes a statement specifying whether domiciliary or principal proceedings from another state or country exist and the name and address of the foreign personal representative and the court issuing letters, if any.
☐	The Petition specifically describes the assets to be distributed, and includes values for each

	asset (e.g., name and address of the financial institution and the associated account number(s), legal property descriptions, etc.).
☐	An oath of personal representative and a designation of resident agent were filed, and they comply with the applicable probate rules.
☐	If this is a testate estate a proposed order admitting will of non-resident and appointing personal representative was filed, and the order provides space for the Court to enter a bond in its discretion.
OR	OR
☐	If this is an intestate estate, an order appointing personal representative was filed, and the order provides space for the Court to enter a bond in its discretion.
☐	The signature page of the proposed order contains at least four (4) lines of text and has the case number on it.
☐	Proposed letters of administration were filed and they contain at least four (4) lines of text on the signature page.

Please complete the Certification that applies to your filing (either Certification A or Certification B). If Petitioner is represented by counsel, only counsel must complete the applicable Certification Clause. If Petitioner is pro se then the applicable Certification must be completed by Petitioner.

CERTIFICATION A:

The undersigned Petitioner ☐ (print name) _____ /Attorney ☐ (print name) _____ certifies that he/she has reviewed the information necessary to support the Petition for Formal Administration of Intestate Estate. The Petitioner ☐ / Attorney ☐ further certifies that all the required information was previously filed or filed concurrently with the Petition. The Petitioner ☐ / Attorney ☐ acknowledges that the Petition will not be reviewed by Court staff until the necessary information has been accepted into the e-filing system. The Petitioner ☐ / Attorney ☐ further acknowledges that a hearing may be required to process the Petition.

Petitioner's signature: _____

Signed on: _____, 20____

OR

Attorney's signature: _____

Signed on: _____, 20____

CERTIFICATION B:

The undersigned Petitioner ☐ (print name) _____ / Attorney ☐ (print name) _____ certifies that he/she has reviewed the information necessary to support the Petition for Formal Administration of Intestate Estate. The Petitioner ☐ / Attorney ☐ certifies that, after a diligent search and reasonable effort, the Petitioner ☐ / Attorney ☐ was unable to submit the following information for the following reasons:

The Petitioner ☐ / Attorney ☐ acknowledges that a hearing may be required concerning the deficiency.

Petitioner's signature: _____

Signed on: _____, 20____

OR

Attorney's signature: _____

Signed on: _____, 20____