

Petition for Administration (testate) Checklist

| | | |
|---------------------------|---|---|
| Estate of | | |
| Case No: | | |
| Date: | | |
| | Certified copy of death certificate [731.103(1), 5.171(a), 5.205(a)(1), (c)] | |
| | Petitioner's interest in estate and address [731.201(21), 733.202, 5.200(a)] | |
| | Must be Fla Res _____ OR Related to decedent w/in certain degree: _____ [733.304] | |
| | Correct benes listed incl birthdates of minors [731.201(2), 5.200(c)] Minors? ____ | |
| | Venue is proper [733.101, 5.050, 5.200(d)] | |
| | Assets AND approximate values listed [5.200(g)] | |
| | Verified Petition [5.200, 5.020(e)] | |
| | Will is an original will ____, not a copy, OR Petition to Establish Lost will is filed ____ | |
| | [733.207, 5.510] | |
| | Will Self-proved [732.503, 733.201(1)] | |
| | Will not self proved And <input type="checkbox"/> | Oath of witness filed [733.201(2)] |
| | Preference: PR named in will [733.301(1)(a)1, 5.200(e)] OR | |
| | Other reason for preference: _____ [733.301, 5.200(e)] | |
| | If no preference, notice given? ____ [733.212, 5.201] | |
| | Bond waived in will [733.402(1)] OR | |
| | Bond waived by interested parties OR Petition to waive filed, If Not: [733.402(4), 5.180(a)(1)(G), 5.235] | |
| | Cash Assets: | \$ _____ |
| | Other Assets: | \$ _____ Wrongful death case? ____ |
| | Oath and designation of resident agent [5.110, 5.235(a)(3), 5.320] | |
| | Proposed correct Order Admitting Will and Appointing Personal Representative | |
| | Proposed correct Letters of Administration | |
| | If minors or wrongful death / PI case - do order and letters have restrictive language? (i.e. "All proceeds from settled claims need to be put into a restricted account pursuant to Fla. Stat. §69.031") | |
| Beneficiaries: | | |
| | | |
| | | |
| Attorney Required: | | Fla Prob R. 5.030 |
| Comments: | | |
| Recommendation: | | |

(Updated: July 2007)