

CASE MANAGEMENT CHECKLIST

Estate of	
Case No.:	
Review Date:	
Attorney:	

This file *contains* the following items:

- ___ inventory [733.604, 5.340]
- ___ proof of publication* (notice to creditors) [733.2121, 5.241]
- ___ statement regarding creditors* [5.241(d)]
- ___ creditor's notice sent to AHCA*‡ (dec age \$ 55)[733.2121(3)(d). 5.241(a)]
- ___ creditor's notice or inventory sent to Dept Revenue*‡ [733.2121(3)(e)]
- ___ formal notice of admin. to or consents from all benes [731.302, 733.212, 5.180]
- ___ non-tax affidavit (dod after 1/1/00) **OR** [FS 198.26, 198.32]
 - ___ Fla tax closing letters AND ___ Fed estate tax closing letters
- ___ proof all claims settled (or ntc if no assets) [733.705, 733.901(2), *see* 5.400(b)(2)]
- ___ petition for discharge (w/ waivers or final accounting) [5.400]
- ___ proposed distribution (listed or waived) [5.400(b)(5), (f)]
- ___ final accounting or waivers [5.346, 5.400(a), (f)]
- ___ notice of discharge, final accounting to benes and creditors (or waivers) [731.302, 5.180, 5.400(c)]
- ___ proof of distribution (receipts or cashed checks) [5.400(e)]
- ___ Contested: Notice- fed estate tax return due Notice- civil action or Adversary proceeding
(Circle One) [5.025, 5.065, 5.395]

Beneficiaries		Creditors

COMMENTS: _____

* not required if decedent deceased for more than 2 years ‡ notice to creditors, or for Dept of Revenue, a copy of the inventory is usually sent, which is acceptable