

**SUMMARY ADMINISTRATION PETITION**

Estate of \_\_\_\_\_  
 Case No.: \_\_\_\_\_  
 Date: \_\_\_\_\_  
 Attorney: \_\_\_\_\_

**Checklist**

<input type="checkbox"/>	Certified copy of death certificate [731.103(1), 5.205(a)(3)]
<input type="checkbox"/>	Venue proper(county resident or non-res of state with prop in cnty) [733.101, 735.201]
<input type="checkbox"/>	Deceased > 2 years <b>**OR**</b> estate <= \$75,000 [735.201(2)] (circle one)
<input type="checkbox"/>	Correct beneficiaries listed, incl dob for minors [See 735.203, 735.206(3); 5.530(a)(3)]
<input type="checkbox"/>	List all assets and values [5.530(a)(8)]
<input type="checkbox"/>	Not indebted OR: [735.206(2), 5.530(a)(3)]
<input type="checkbox"/>	The name and address of each creditor, the amount of the debt, whether amount is exact or estimated, AND [5.530(a)(9)(B)]
<input type="checkbox"/>	Provision for full payment of the debt, OR [5.530(a)(9)(B)]
<input type="checkbox"/>	The name of the person paying the debt, creditor's consent, amount if debt is compromised, and terms of payment with any limitations of liability for payor. [5.530(a)(9)(B)]
<input type="checkbox"/>	Diligent search made for creditors & penalty for failure included* [735.206(2), (4)(d), 5.530(a)(9)]
<input type="checkbox"/>	Proposed distribution of assets [735.203(3), 735.206(3), 5.530(a)(12)]
<input type="checkbox"/>	Signed by benes and spouse or consents filed or formal ntc w/o obj for those not receiving full share. [735.203(1), (3), 5.530(b)]
<input type="checkbox"/>	Petition verified [731.104, 735.203(1), 5.020(e), 5.530(a)]
<input type="checkbox"/>	Notice of petition given to creditors [735.206(2), 5.530(b)]
<input type="checkbox"/>	Is there a will? (yes or none), If so:
<input type="checkbox"/>	Will is Self proved [732.503, 733.201(1)] and is Original Will [See 5.200(j), 5.530(b)]
<input type="checkbox"/>	Will not Self-Proved AND <input type="checkbox"/> Oath of Witness to Will Filed [733.201(2)]
<input type="checkbox"/>	Will admitted to Probate [5.530(b)] (or proposed order admitting is attached)
<input type="checkbox"/>	If real property, it is not homestead [Fla. Const.] or separate homestead petition filed
<input type="checkbox"/>	Order includes items of prop, acct or id #, \$ amounts & cc to creditors, if any [735.206(3); see 5.530(d)]

**Beneficiaries**

**Creditors**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Comments:** \_\_\_\_\_

\*Unless claims are barred. If claims are barred, note this on the creditors' list