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SUMMARY ADMINISTRATION CHECKLIST

Estate: _____ Case No.: _____ Date: _____

Petition for Summary Administration: Florida Statutes §735.201 and §735.203; Florida Probate Rule 5.530

Item	Description	Florida Statute	Probate Rule
1.	Petitioner's interest in estate.	§735.203(1)	5.530(a)(1)
2.	Decedent's last known address, last 4 digits of SSN, date and place of death, and state and county of domicile.		5.530(a)(2)
3.	Names & Addresses of beneficiaries (include spouse and qualified trust beneficiaries, if applicable).	§735.203	5.530(a)(3)
4.	Statement showing venue.	§733.301	5.530(a)(4)
5.	Statement whether domiciliary proceedings are pending in any other state.	§734.104; 734.201	5.530(a)(5)
6.	Statement that the Decedent's will does not direct administration as required by chapter 733, Florida Statutes.	§735.201(1)	5.530(a)(6)
7.	Statement that the value of the estate does not exceed \$75,000, or decedent has been dead for more than 2 years.	§735.201(2)	5.530(a)(7)
8.	Description of all assets in the estate and estimated value of each, a separate description of any protected homestead and exempt property. (<i>A separate Petition to Determine Homestead Property and Petition to Determine Exempt Property shall be filed, if applicable</i>)		5.530(a)(8)
9.	Statement that creditors are barred, or a diligent search has been made to locate creditors and the penalty for failure to include creditors. ___ Statement that the estate is not indebted; or ___ Creditor information.	§735.206(2); 735.206(4)(d) & 735.206(4)(e)	5.530(a)(9) 5.530(a)(9)(A) 5.530(a)(9)(B)
10.	Statement that after exercise of reasonable diligence the petitioner is unaware of any other unrevoked will or codicil, or statement identifying all unrevoked wills and codicils being present for probate.		5.530(a)(10), (11)
11.	Schedule of proposed distribution –complete description of all assets and the person to whom each asset is to be distributed. (Identical description shall be included on Order of Summary Administration.)		5.530(a)(12)

Summary Administration Checklist

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Order(s):			
Item	Description	Florida Statute	Probate Rule
1.	Order Admitting Will to Probate:		5.530(c)
2.	Order of Summary Administration: Must contain the name of beneficiary and a detailed description of the assets and specifically designating the person to whom the asset is to be distributed.		5.530(d)

Notices:			
Item	Description	Florida Statute	Probate Rule
1.	Consent and Waiver to Petition for Summary Administration from beneficiaries, heirs, or creditors not joining or consenting to Petition (or) Formal Notice must be served and proof of service filed. (Including qualified beneficiaries of the Trust as defined in §736.0103)	§735.203; 735.206(2)	5.040; 5.530(b)
2.	Notice to Creditors :	§733.2121; 735.2063	5.475(b) & 5.475(c)

Death Certificate:			
Item	Description	Florida Statute	Probate Rule
1.	Death Certificate must be filed.		5.205(a)(3)

Last Will And Testament:			
Item	Description	Florida Statute	Probate Rule
1.	Original Last Will and Testament shall be deposited with the Court. Will must be executed in conformity with law and be self-proved.	§732.901(4); §732.502; 732.503	

Other Proceedings and Requirements:			
Item	Description	Florida Statute	Probate Rule
1.	Establishment and probate of a lost or destroyed Will.	§733.207	5.510
2.	Admitting foreign will to record __Decedent has been dead for 2 years; or. __Domiciliary Personal Representative has been discharged.	§734.104	
3.	Notice of Trust	§736.05055	
4.	Ancillary Administration (Non-Resident Decedent).	§734.102; 734.1025; 735.201	5.470; 5.475

Proceedings To Determine Homestead & Exempt Property:			
Item	Description	Florida Statute	Probate Rule
1.	Petition to Determine Homestead Status of Real Property; Include Waivers signed by interested parties or Formal Notice all Interested Parties; or schedule a hearing notifying all interested parties, including creditors.	§732.401, 732.4015	5.405
2.	Petition to Determine Exempt Property; Include Waivers signed by interested parties or Formal Notice all Interested Parties; or schedule a hearing notifying all interested parties, including creditors.	§732.402	5.406

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Intestate:

All intestate probate administrations should include the following:

1. Affidavit of Heirs – must use the form found on the Citrus County Clerk of Court and Comptroller website at www.citrusclerk.org – Click on Courts – click on Probate – under Related Documents click on Affidavit of Heirs
2. Receipt of **paid** funeral expenses