

Checklist for Opening a Formal Administration

Elizabeth A. Metzger, Circuit Judge



Estate of: _____
Case Number: _____
Date case was filed: _____

1. Proper venue of probate proceeding: Yes No
2. All beneficiaries / interested persons named in Petition: Yes No
3. Value of the assets contained in the Petition: Yes No To be determined
Value: _____
4. Original Death Certificate filed with Clerk: Yes No Date Filed: _____
5. Original Last Will & Testament filed with Clerk: Yes No Intestate Date Filed: _____
6. Original Codicil(s) filed with Clerk: Yes No N/A Date Filed: _____
7. Is Last Will & Testament self-proven? Yes No N/A
If no, please explain: _____
8. Is (are) Codicil(s) self-proven? Yes No N/A
If no, please explain: _____
9. Personal Representative named in Petition appropriate: Yes No
If no, please explain: _____
10. Waiver of priority and consent to Personal Representative: Yes No N/A
11. Bond waived in Will: Yes No N/A
Petition / Consent to waive bond: Yes No
12. Oath of Personal Representative & Designation of Resident
Agent and Acceptance: Yes No Date Filed: _____
13. Is Personal Representative a Florida resident? Yes No
14. Clerk's Notice of Administration sent to Caveator: Yes No N/A
15. Is Petition signed and verified by surviving spouse, if any, or
any beneficiaries? Yes No Relationship: _____

I have reviewed the file and completed the Checklist in this matter. Everything on the Checklist is accounted for and proposed Orders (in Word format) are now proper to be sent to the Judge's office with a cover letter via e-mail only to ProbateMC@circuit19.org.

Attorney Signature (no e-signatures): _____
Printed Name: _____
Date: _____

Additional information or comments:

