

Checklist for Opening a Formal Administration

Steven J. Levin, 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. Affidavit of Heirs: Yes No Not Applicable
(To be submitted with all petitions for intestate estates OR upon request by the Court.)

4. Value of the assets contained in the Petition: Yes No To be determined

Value: _____

5. Original Death Certificate filed with Clerk: Yes No Date Filed: _____

6. Original Last Will & Testament filed with Clerk: Yes No Intestate Date Filed: _____

7. Original Codicil(s) filed with Clerk: Yes No N/A Date Filed: _____

8. Is Last Will & Testament self-proven? Yes No N/A

If no, please explain: _____

9. Is (are) Codicil(s) self-proven? Yes No N/A

If no, please explain: _____

10. Personal Representative named in Petition appropriate: Yes No

If no, please explain: _____

11. Waiver of priority and consent to Personal Representative: Yes No N/A

12. Bond waived in Will: Yes No N/A

Petition / Consent to waive bond: Yes No

13. Oath of Personal Representative & Designation of Resident

Agent and Acceptance: Yes No Date Filed: _____

14. Is Personal Representative a Florida resident? Yes No

15. Clerk's Notice of Administration sent to Caveator: Yes No N/A

16. 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 ProbateSLC@circuit19.org.

Attorney Signature (no e-signatures): _____

Printed Name: _____

Date: _____

Additional information or comments: _____