

Checklist for Closing a Formal Administration

Charles A. Schwab, Chief Judge



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

1. Petition for Administration: Date Filed: _____
2. Original Death Certificate: Date Filed: _____
3. Original Last Will & Codicil(s): Yes No Intestate
4. Order Admitting Last Will & Codicil(s) to Probate: Date Filed: _____ N/A
5. Order Appointing Personal Representative: Date Filed: _____
6. Letters of Administration: Date Filed: _____
7. Notice of Administration: Date Filed: _____
Proof of Service of Notice of Administration: Date Filed: _____
Sole beneficiary:
Waivers by interested parties: Date Filed: _____
8. Statement of diligent search for creditors: Date Filed: _____
9. Proof of service of Notice to Creditors: Date Filed: _____
Agency for Health Care Administration: Date Filed: _____
Florida Department of Revenue (*if creditor - §733.2121(e)*): Date Filed: _____
10. Proof of Publication: Date Filed: _____
11. Creditor Period: (*see pg. 2 for creditor claims*) From: _____ To: _____
12. Verified Inventory: Date Filed: _____
Proof of Service of Verified Inventory Date Filed: _____
13. Notice of Federal Estate Tax Return and Federal Estate Tax Closing Letter (*if required*): Date Filed: _____
14. Affidavit of No Florida Estate Tax Due: Date Filed: _____
15. Petition for Discharge Date Filed: _____
16. Report of Distribution Date Filed: _____
17. Final Accounting or Waivers by all interested parties: Date Filed: _____
18. Proof of Service of Final Accounting (*unless waived*) Date Filed: _____

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 knowlesg@circuit19.org.

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

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| Creditor | Amount of Claim | Date Claim Filed | Date Satisfied / Stricken |
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Additional information or comments: