

# Checklist for Opening a Formal Administration

Charles A. Schwab, Chief 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 [knowlesg@circuit19.org](mailto:knowlesg@circuit19.org).

Attorney Signature (no e-signatures): \_\_\_\_\_

Printed Name: \_\_\_\_\_

Date: \_\_\_\_\_

Additional information or comments: