

Checklist for Opening a Formal Administration

Rebecca White, 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 Probate@circuit19.org.

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

Additional information or comments: