Checklist for Opening a Formal Administration
Laurie E. Buchanan, 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 filandac@circuit19.org.

Attorney Signature (no e-signatures): _____

Printed Name: _____

Date: _____

Additional information or comments:

Updated: August 1, 2017

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