

IN THE CIRCUIT COURT IN AND FOR SUMTER COUNTY, FLORIDA

CHECKLIST FOR SUMMARY ADMINISTRATION
includes
CHECKLIST FOR DETERMINATION OF HOMESTEAD STATUS OF REAL
PROPERTY

Estate of: _____ **Case No.:** _____

Attorney of Record: _____

Date of Death: _____ Age at Death: _____ Marital Status: _____

Decedent's County of Residence as Listed on Death Certificate:

☐ Sumter County

☐ Other County (list): _____

Type of Estate:

☐ TESTATE ☐ INTESATE ☐ TESTATE with Trust ☐ ANCILLARY

NOTE: Please fill out checklist completely to assist the Court in processing your Order(s). If you do not provide correct dates in the "Date Docketed" column for applicable items, the Checklist will be determined to be incomplete and no further action taken until it is complete. ALL documents must be filed and showing in the Court file PRIOR to submitting your Order(s).

Initials: _____

	DATE Docketed to Court File
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Required in All Cases:

1.	Original/Certified Death Certificate** If filed with a Will Deposit, Case Number: _____ Original/Certified Death Certificate of Spouse ** (when applicable)	
2.	Notice of Confidential Information Within Court File	
3.	Affidavit of No Florida Estate Tax Due (DR-312)	

	N/A	DATE Docketed to Court File
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Required if Deceased Less than 2 Years:

4.	Copy of Paid Funeral Bill (Must Reflect Paid in Full or Proof of Payment Provided)		
5.	Proof of Payment in Full for All Doctor/Hospital Bills		
6.	Formal Notice of Petition for Summary Administration to the Agency for Healthcare Administration (AHCA) and Proper Proof of Service of Formal Notice to AHCA		
7.	If applicable: Formal Notice of Petition to Determine Homestead Status of Real Property to the Agency for Healthcare Administration (AHCA) and Proper Proof of Service of Formal Notice to AHCA		

Required in INTESTATE Estates:

8.	Affidavit of Heirs		
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Required in TESTATE Estates:

9.	Original Last Will and Testament Date of Will: _____		
10.	If applicable: Original Codicil Date of Codicil: _____		
11.	If a COPY is filed - Petition to Establish Lost Will See section 16 below.		

	DATE Docketed to Court File
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12.	<p>If the original Last Will and Testament has been filed in another case, please indicate the type of case and the Sumter County Case Number.</p> <p>Case Type (check one): Case No.:</p> <p><input type="checkbox"/> Will Deposit _____</p> <p><input type="checkbox"/> Notice of Trust _____</p> <p><input type="checkbox"/> Guardianship _____</p> <p><input type="checkbox"/> Caveat _____</p> <p>[If Interested Person Caveat has been filed, Formal Notice must be served on the Caveator before further action can be taken on Petition for Summary and Proof of Service Filed]</p> <p>- Formal Notice – Date Filed: _____</p> <p>- Proof of Service of Formal Notice – Date Filed: _____</p>
13.	<p>Is Will self-proved? <input type="checkbox"/> YES or <input type="checkbox"/> NO</p> <p>If applicable:</p> <p><input type="checkbox"/> self-proved under law where executed</p> <p><input type="checkbox"/> authority provided from other state where executed</p>
14.	<p>If NOT self-proved, Oath Of Witness to Will</p>
15.	<p>With a Trust as a Beneficiary of the Will:</p>
	<p><input type="checkbox"/> Notice of Trust</p>
	<p><input type="checkbox"/> Affidavit/Designation of Trust Beneficiaries</p>

	N/A	DATE Docketed to Court File
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16. PETITION TO ESTABLISH LOST WILL (if applicable) <i>(By separate Petition or required language included in Petition for Summary Administration)</i>		
Establishment and probate of lost or destroyed Will requires (check to indicate filed in court file): <input type="checkbox"/> Copy of Will <input type="checkbox"/> Oath of Witness(es) to Will <input type="checkbox"/> Notice to those who, but for the Will, would inherit (intestate succession) <input type="checkbox"/> Affidavit of Heirs		

Required in All Cases:

17. PETITION FOR SUMMARY ADMINISTRATION	
Must contain all required information, including, but not limited to: <ul style="list-style-type: none"> ○ The name, address, relationship and date of birth (if minor) of each heir or beneficiary ○ A schedule of all assets of the estate and their estimated value <ul style="list-style-type: none"> ○ Separately designating Homestead Property] [See section 18 below] ○ A proposed schedule of distribution of all assets and the “Name, Address, and Asset Share or Amount” of the person to whom each asset is to be distributed 	
ALL heirs, beneficiaries, (trust beneficiaries, if applicable), and creditors have joined in the Petition. If NOT , then:	
A proper Joinder, Waiver and Consent by all heirs, beneficiaries, (trust beneficiaries, if applicable), and creditors has been filed.	
OR	
Formal Notice been served on any heir, beneficiary, (trust beneficiary, if applicable), or creditor NOT joining or consenting to the Petition. AND Proof of Service Filed	_____ _____

	N/A	DATE Docketed to Court File
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18.	PETITION TO DETERMINE HOMESTEAD STATUS OF REAL PROPERTY (If applicable)		
	Must contain all required information, including, but not limited to: <ul style="list-style-type: none"> ○ The date of decedent's death ○ The County of the decedent's domicile at the time of death ○ The name and address of the decedent's surviving spouse <ul style="list-style-type: none"> ○ The name, address, relationship and date of birth (if minor) of each heir or beneficiary. ○ A complete Legal Description of the property owned and resided on by the decedent ○ Whether the real property constituted the protected homestead of the decedent ○ Testate: Indicate if there is a Surviving Spouse or minor child ○ Intestate: Does the Proposed Order provide for a Life Estate for Spouse 		
	ALL heirs, beneficiaries, (trust beneficiaries, if applicable), and creditors have joined in the Petition. If NOT , then:		
	A proper Joinder, Waiver and Consent by all heirs, beneficiaries, (trust beneficiaries, if applicable), and creditors has been filed.		
	OR		
	Formal Notice been served on any heir, beneficiary, (trust beneficiary, if applicable), or creditor NOT joining or consenting to the Petition. AND Proof of Service Filed		_____ _____

ORDER(S) BEING PROVIDED TO THE COURT WITH CHECKLIST

PLEASE NOTE: Proposed Orders shall be MAILED/DELIVERED to Judge Hatcher's office with a copy of this Checklist. Proposed Orders SHALL NOT be emailed, e-filed through the portal, or provided to the Clerk of Court.

Please indicate which Order(s) are being provided to the Court by checking the applicable box.

☐

Order Admitting Will/Codicil to Probate
(Testate Estates)

☐

Order of Summary Administration
(Must be specific as to whom property is to be distributed: *Name; Address; and, Asset, Share or Amount*)

☐

Order Determining Homestead Status of Real Property – If applicable
(Must include the real property address and a complete legal description)

☐

Order Establishing Lost Will – If applicable
(Must include full terms & provisions)

I CERTIFY that I have personally reviewed and completed the foregoing Checklist, and it is true and accurate to the best of my knowledge.

Attorney/pro se Litigant for Estate: _____
(Printed Name)

Mailing Address: _____

City: _____ **State:** _____ **Zip:** _____

Phone Number: (____) _____

Email Address (if pro se Litigant): _____

Signature: _____

Date: _____