**FORMAL ADMINISTRATION CLOSING CHECKLIST**

**PROBATE CASE NO.:**  **DATE OF DEATH:**

**ESTATE OF:**

**ATTORNEY OF RECORD:**

**ESTATE: Testate**   **Intestate**   **Ancillary**

**FLA.**

**STATUTE**

**Affidavit of Heirs file?** YES NO

**Petition to Determine Exempt Property filed?** YES NO 732.402

**Petition to Determine Homestead filed?** YES NO 5.405

**Any Adversary Proceeding filed?** YES NO 5.025

Type:

**All Adversary Proceeding(s) Actions disposed?** YES NO

*(If NO, attach explanation.)*

**NOTICE OF ADMINISTRATION**

1. Date Original Death Certificate filed: 5.171&5.205
2. Date Letters of Administration issued: 733.401
3. Proof of Service of Notice of Administration 5.040(4)

Number required: Proofs or Waivers filed? YES NO

**NOTICE TO CREDITORS**

1. Known Creditors served with Notice to Creditors? YES NO 733.2121(3)(a)
2. Proof of Publication of Notice to Creditors filed? YES NO 5.241(c)
3. Agency of Health Care Administration served? YES NO 733.2121(3)(d)
4. Department of Revenue served? YES NO 733.2121(3)(e)
5. Claims period expiration date? 733.2121
6. State Regarding Creditors filed: YES NO 5.241(d)
7. Claims filed? YES NO **If “YES,” how many?**
8. All Claims resolved? YES NO **If “NO,” attach explanation.**

**UNCLAIMED PROPERTY**

1. Check with Bureau of Unclaimed Property? YES NO

**INVENTORY**

**FLA.**

**STATUTE**

1. Inventory due date: 5.340(a)
2. Date Inventory filed:
3. Department of Revenue served? YES NO 199.062(2) \*

\*Statute repealed on 1/1/7 & 733.2121(3)(e)

1. Proofs of Service of Inventory:

Number required? All Proofs filed? YES NO 5.340(d)

(If “NO,” attach explanation.)

**CIVIL ACTIONS**

1. Notice of Civil Action filed? YES NO 5.065
2. All Civil Actions disposed? YES NO

(If “NO,” attach explanation.)

**TAXES**

1. Affidavit of No Tax Due filed/recorded? YES NO 198.32(2)

(If No Taxes Due, proceed to FINAL ACCOUNTING.)

1. Notice of Estate Tax Return filed and served? YES NO 5.395

Due date of Estate Tax Return:

Extended to:

1. Federal Estate Tax Closing Letter filed? YES NO
2. Florida Estate Tax Certificate filed/recorded? YES NO 198.26

**FINAL ACCOUNTING**

1. Final Accounting filed? YES WAIVED BY ALL NO 5.400
2. Any Objections to Final Accounting? YES NO
3. All Objections to Final Accounting resolved? YES NO N/A

(If “NO,” attach explanation.) 5.401

**CLOSING**

1. Petition for Discharge filed? YES NO 5.400

Date filed:

Presumptive Discharge date: 5.400(c)

Petition to Extend filed? YES NO 5.400(c)

If “YES,” extended to:

1. Interested Persons other than Petitioner at the time of the filing of the Petition

of Discharge: YES NO 731.201(21)

(If “YES,” list below.)

**PETITION FOR DISCHARGE**

1. Waiver Date Served:
2. Waiver Date Served:
3. Waiver Date Served:
4. Waiver Date Served:
5. Waiver Date Served:
6. Waiver Date Served:
7. Waiver Date Served:
8. Waiver Date Served:
9. Waiver Date Served:
10. Waiver Date Served:

Any Objections to Petition for Discharge filed? YES NO

All Objections to Petition for Discharge resolved? YES NO N/A

(If “NO,” attach explanation.)

As Attorney for the Personal Representative, I CERTIFY this \_\_\_\_\_\_ day of , 20\_\_\_, that **I have personally reviewed** the foregoing Formal Administration CLOSING Checklist and that the information provided here is accurate.

Attorney for Estate

FL BAR NO.:

Attorney’s Mailing Address:

Email Address:

Telephone No.:

Facsimile No.:

**CLERK’S NOTES:**

Fla. Stat. § 733.901(2)

Order of Discharge Date:

COURT AND /OR EX PARTE CLERK COMMENTS: