## ATTACHMENT 4 TO SRCAD 2018-02

## IN THE CIRCUIT COURT IN AND FOR SANTA ROSA COUNTY, FLORIDA

## CHECKLIST FOR CLOSING FORMAL ADMINISTRATION

Estate of:			Case No:			
Date of Death:	Attorn	ney of Record:				
Age at Death:	N	Marital Status:				
Decedent's Resider		Certificate:				
Type of Estate:	Testate	Intestate	Ancil			
			<b>7</b> /1	Attorn rtifica	-	Review of Attorney Certification
			YES	NO	N/A	CONFIRMED
1. Notice of Admi	inistration Served as R	Required by 5.240				
Surviving spouse s	erved? 5.240(a)(1)	No surviving spouse:   ☐				
Proof of Serv	ice to Spouse filed?					
If surviving sp 5.240(e)?	pouse is not served is waiver	signed and filed as required by				
All beneficiaries se	erved? 5.240(a)(2)					
Proof of Service to all beneficiaries filed?						
If all beneficiaries are not served are waivers signed and filed as required by 5.240(e)?						
Trustee of trust served as described in 733.707(3)? 5.240(a)(3) No Trust: □			]			
Proof of Service to trustee filed?						
If trustee is no	ot served are waivers signed	and filed as required by 5.240(e)	?			
	in 736.0103(16) been served	nas each qualified beneficiary of d? 5.240(a)(3) s not a personal representative:				
Proof of Serv	ice to each qualified benefic	iary of the trust filed?				
All persons who may be entitled to exempt property as defined in 732.402 served? 5.240(a)(4) None: □						
Proof of Servi served?	ice to all persons who may b	e entitled to exempt property				
	itors as Required by 5.		1			
Notice to Creditors as required by 733.		for Health Care Administration Decedent not 55+:				
Proof of Servi	Proof of Service to Agency for Health Care Administration filed?					
Was Notice to Cred	Was Notice to Creditors required to be served on Department of Revenue?					
If so, was Dep	partment of Revenue served?	?				
Proof of Serv	ice of Inventory filed?					
All other known cr	reditors have been served and	d Proof of Service has been filed?				

		Attorney Certification			Review of Attorney Certification
		YES	NO	N/A	CONFIRMED
	Proof of Publication of Notice of Creditors filed? 5.241				
	If Proof of publication is not filed are claims barred as described in 733.710(1)? Proof of Publication filed:				
	Verified Diligent Search and Statement Regarding Creditors filed within 4 months of 1 <sup>st</sup> publication date as required by 5.241(d)? Claims barred:				
3.	3. Verified Inventory Filed Within 60 Days from the Issuance of Letters of Administration as Required by 5.340 and 733.604				
	Surviving spouse served as required by 5.340(d)? No surviving spouse: □				
	Proof of Service to spouse filed?				
Each Heir at Law in an intestate estate served as required by 5.340(d)?  Not intestate:					
	Proof of Service to Each Heir at Law filed?				
	Each residuary beneficiary in a testate estate served as required by 5.340(d)?  Not testate:				
	Proof of Service to each residuary beneficiary filed?				
	All other interested person(s), who have requested the Inventory in writing, served as required by 5.340(d)? None:				
	Proof of Service to all other interested person(s) filed?				
4.	Notice to Nonresiduary Beneficiaries as Required by 5.340(f) an	d 733	.604	T	
	All nonresiduary beneficiaries have been provided:  Written notice of their right to receive a written explanation of how the inventory value for each asset distributed to them, or proposed to be distributed to them, was determined; or  Witten notice of their right to receive a copy of an appraisal, if any, of the assets.	If yes, mark boxes on left			
5.	Creditors 733.705 and 733.710(1) Estate is NOT indebted □				
	Claims are barred as described in 733.710(1)?				
	All filed claims are satisfied?				
	All filed claims that are not satisfied are settled?				
	Objection to claim has been filed as described in 733.705(2)?				
	No Independent Action has been timely filed as described in 733.705(5)?				
6.	Taxes 5.395 and 198.32				
	Affidavit of no FL tax due filed as described in 198.32?				
	Notice of Federal Tax Return served on all Interested Parties?				
	Tax Return due nine months from date of death or (date)				
	Federal Estate Tax Closing Letter filed?				
7.	Civil Actions and Adversary Proceedings 5.025 and 5.065				
	Any adversary proceedings filed? 5.025				
	If yes, have proceedings been disposed?				
	Any Notice of Civil Actions filed? 5.065				

			ttorne rtificat	-	Review of Attorney Certification
		YES	NO	N/A	CONFIRMED
	If yes, have proceedings been disposed?			1 1/12	00112 2221,2222
8.	Final Accounting Complying with 5.400, 5.180, and 731.302				
	Final Accounting filed in accordance with 5.400(c)?				
	Were all Interested Persons served? No final accounting filed:				
	Any objections to final accounting filed? No final accounting filed:				
	All objections resolved? No final accounting filed:				
	If Final Accounting was not filed, are waivers by all interested parties filed in accordance with 5.180? Final accounting filed:				
9.	accordance with 5.180? Final accounting filed:  Petition for Discharge Complying with 5.400 Filed				
•	Petition for Discharge signed by the Personal Representative? 5.330(g)				
	Petition for Discharge served on all interested persons? 5.400(c)				
	If Petition for Discharge has not been served, are consents filed?				
	The 30 day time period is expired for filing objections to the discharge?				
	Are there any unresolved objections to the Petition for Discharge?				
	Name of Interested Persons served with Petition for Discharge:				
	1. Waiver ( ) or Date Served ( / / )				
	2. Waiver ( ) or Date Served ( // )				
	3. Waiver ( ) or Date Served ( // )				
	4. Waiver ( ) or Date Served ( / / )				
	5. Waiver ( ) or Date Served ( / / )				
	6. Waiver ( ) or Date Served ( / / )				
	7. Waiver ( ) or Date Served ( / / )				
10.	Plan of Distribution Complying with 5.400(b)(5) Filed				
	Report of Distribution filed as required by 5.400(e)?				
	If Report of Distribution is not filed are waivers filed as described in 5.180(b)? Proof filed:				
11.	Beneficiaries/Heirs				
	Receipts from all beneficiaries/heirs filed? Waivers filed:				
12.	Compensation Fees Paid 5.400(b)				
	Petition for Discharge shows compensation paid to attorneys, accountants, personal representative(s) and others employed by the personal representative(s)?				
	Petition for Discharge shows the manner of determining compensation?				
13.	Miscellaneous				
	Petition to Determine Exempt Property filed? 5.406 / 732.402				
	Order Determining Exempt Property issued?				
	Petition to Determine Homestead Exemption filed? 5.405				
	Order Determining Homestead Exemption issued?				

		Attorney Certification		•	Review of Attorney Certification
		YES	NO	N/A	CONFIRMED
	Petition to Determine Family Allowance filed? 5.407				
	Order Determining Family Allowance issued?				
	Petition to Determine Beneficiaries filed? 5.385				
	Order Determining Beneficiaries issued?				
	The State of Florida checked for unclaimed property? https://www.fltreasurehunt.org				
	Death Certificate of any beneficiaries filed?				
	Proposed Order of Discharge filed?				

I certify that I have personally reviewed the foregoing checklist and it is accurate. In making the certification, I have relied upon the information set forth in the pleadings and court filings.

Attorney for Estate:	Date:
Mailing Address:	
City:	State: Zip:
Phone Number: ()	
Email address:	