

PROBATE CHECKLIST

ESTATE OF _____

DOD _____

Personal Representative: _____

Phone: _____ Alt. Phone: _____

Address: _____

Client's E-Mail Address: _____

Decedent's Social Security No.: _____

EIN: _____ Case No.: _____

To Open an Estate:

E-File:

- | | |
|------------------------------------------------------|---------------------------------------------------------|
| <input type="checkbox"/> Petition for Administration | <input type="checkbox"/> Oath of PR and Designation |
| <input type="checkbox"/> Notice of Administration | <input type="checkbox"/> Notice of Trust (in duplicate) |
| <input type="checkbox"/> Waiver of Formal Service | |

Mail to Clerk Probate Dept:

- | | |
|----------------------------------------------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Original Death Certificate | <input type="checkbox"/> Original Will |
| <input type="checkbox"/> Notice of Confidential Information
(For Death Certificate) | <input type="checkbox"/> Original Oath of PR |
| <input type="checkbox"/> Bond (if required) | |

Mail to Judge/ E-file/ Upload to JAWS (depends on county):

- | | |
|------------------------------------------------------|----------------------------------------------------|
| <input type="checkbox"/> Proposed Letters (2 copies) | <input type="checkbox"/> Proposed Order (2 copies) |
| <input type="checkbox"/> Copy of Petition for Admin | <input type="checkbox"/> Copy of Oath of PR |
| <input type="checkbox"/> Copy of Death Certificate | <input type="checkbox"/> Copy of Will (if any) |
| <input type="checkbox"/> Stamped Return Envelope | |

Mail to Recording Dept:

- | | |
|------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| <input type="checkbox"/> Original Death Certificate | <input type="checkbox"/> Affidavit of No FL Estate Tax Due
(DR-312 or DR-313) |
| <input type="checkbox"/> Affidavit of Continuous Marriage
(If applicable) | <input type="checkbox"/> Check for Recording Fees |
| <input type="checkbox"/> Stamped Return Envelope for Return of the Originals | |

***Mail Form 56 to IRS.**

***Mail Unclaimed Property Letter.**

<u>TO DO:</u>	<u>DUE DATE:</u>	<u>CHECK/DATE WHEN DONE:</u>
LOA Issued		_____
Serve NOA Within 30 days after LOA Issued	_____	_____
File Receipts of NOA Promptly		_____
File Proof of Service of NOA Promptly		_____
Apply for Tax ID SS4 & Auth Letter		_____
First Publication Promptly		_____
Serve NOC Promptly after Pub - Certified Mail, Return Receipt *MUST SERVE ON AHCS IF OVER 55!!!**		_____
File Proof of Publication Upon receipt of Affidavit of Publication		_____
Claims Expire 3 Mos. From Pub	_____	
Objections Expire 4 Mos. From Pub	_____	
File Stmt Re: Creditors 4 Mos. From Pub	_____	_____
PR's Proof of Claim 3 Mos. From Pub	_____	_____
Bank/Brokerage Letters Sent Promptly		_____

Original Valuations Done

Promptly

Inventory Safe Deposit Box

Estate Checking Account Opened

TO DO:

DUE DATE:

CHECK/DATE WHEN DONE:

Insurance Claims Filed

Form 712 Requested

Inventory

60 Days from LOA

File Proof of Service of Inventory

Promptly after Inventory is filed

HAVE REQUIRED MINIMUM DISTRIBUTIONS BEEN TAKEN????

****IF NECESSARY****

Estate Tax Return

3 months and 15 days after end of Fiscal year

INFORMAL ESTATE CLOSING:

1. Waiver of Accounting, receipt and consents filed.
2. Order of Discharge Signed.

FORMAL ESTATE CLOSING:

1. Notice of Final Accounting and Petition for Discharge sent to Beneficiaries.
2. Proof of formal service filed.
3. 30 Day Objection Period Expires: _____
4. Report of Distribution and Receipts Filed.
5. Order of Discharge Signed.