

**IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT,  
IN AND FOR PALM BEACH COUNTY, FLORIDA  
PROBATE DIVISION**

**CHECKLIST FOR PETITION FOR FORMAL ADMINISTRATION OF  
INTESTATE ESTATE**

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This checklist shall be completed and e-filed with your Petition. **Please review and sign the applicable certification clause at the end of the checklist prior to submitting it with your Petition. If any of the items below are not checked, please complete “Certification B.”**

Completing and e-filing this Checklist does not remove any additional obligations imposed by rule or statute.

CASE NUMBER: \_\_\_\_\_ in Re Estate of: \_\_\_\_\_

	Pro-se petitioner only: The Petitioner filed an Affidavit Regarding Criminal History <sup>1</sup> (You may only file pro-se if you are the sole beneficiary. Fla. Prob. R. 5.030)
	<b>A copy or digitized copy of the death certificate (do not redact social security number) was filed. Fla. Stat. §731.103(1); Fla. Prob. R. 5.205(a), 5.171</b>
	An Affidavit of Heirs was filed.
	The Petition is verified.
	The Petition is signed by the interested person(s).
	The Petition is signed by the attorney of record.
	The Petition includes the Petitioner’s relationship to decedent and the Petitioner’s residence.
	The Petitioner, is mentally and physical able to perform the duties of a personal representative, is 18 years or over, have not been convicted in any state or foreign jurisdiction of abuse, neglect, or exploitation of an elderly person or a disabled adult and is not a convicted felon and the Petitioner is a Florida resident. If the Petitioner is not a Florida resident, the Petitioner is related to the decedent within the statutorily required degree. <b>Probate Rule 5.200 as amended 11/4/2021</b>
	The correct beneficiaries are listed in the Petition with the birthdates of the minor beneficiaries, if any.
	The proposed personal representative has preference of appointment in an intestate administration. Any person with priority is accounted for (notarized renunciation or original death certificate).
	The assets of the estate and the approximate value of the assets are listed in the Petition.
	An oath of personal representative and designation of resident agent were filed, and they comply with the applicable probate rules. <b>Probate Rule 5.320 as amended 11/4/2021</b>

**Please complete the Certification that applies to your filing (either Certification A or Certification B). If the Petitioner is represented by counsel, only counsel must complete the applicable Certification Clause. If the Petitioner is pro se then the applicable Certification must be completed by the Petitioner.**

**CERTIFICATION A:**

The undersigned Petitioner  (print name) \_\_\_\_\_ /Attorney  (print name) \_\_\_\_\_ certifies that he/she has reviewed the information necessary to support the Petition for Formal Administration of Intestate Estate. The Petitioner  /Attorney  further certifies that all the required information was previously filed or filed concurrently with the Petition. The Petitioner  /Attorney  acknowledges that the Petition will not be reviewed by Court staff until the necessary information has been accepted into the OLS and/or e-filing system. The Petitioner  /Attorney  further acknowledges that a hearing may be required to process the Petition.

Petitioner's signature: \_\_\_\_\_

Signed on \_\_\_\_\_, 20\_\_\_\_

**OR**

Attorney's signature: \_\_\_\_\_

Signed on \_\_\_\_\_, 20\_\_\_\_

**CERTIFICATION B:**

The undersigned Petitioner  (print name) \_\_\_\_\_ /Attorney  (print name) \_\_\_\_\_ certifies that he/she has reviewed the information necessary to support the Petition for Formal Administration of Intestate Estate. The Petitioner  /Attorney  certifies that, after a diligent search and reasonable effort, the Petitioner  /Attorney  was unable to submit the following information for the following reasons: The Petitioner  /Attorney  acknowledges that a hearing may be required concerning the deficiency.

Petitioner's signature: \_\_\_\_\_

Signed on \_\_\_\_\_, 20\_\_\_\_

**OR**

Attorney's signature: \_\_\_\_\_

Signed on \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
<sup>i</sup> Please note that trust companies, banks, as well as other qualified corporations identified in section 733.305, Florida Statutes, are not required to file this affidavit.