

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

**CHECKLIST FOR PETITION FOR FORMAL ANCILLARY
ADMINISTRATION**

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 ⁱ (You may only file pro-se if you are the sole beneficiary. Fla. Prob. R. 5.030)
	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
	The Petition includes a statement showing proper venue.
	This is an intestate estate and the Petitioner has filed an Affidavit of Heirs; OR This is a testate estate.
	The Petition is verified.
	The Petition is signed by the interested person.
	The Petition is signed by the attorney of record.
	<u>The Petitioner requests Letters for the following individual:</u> If this is a testate estate: <div style="margin-left: 40px;">A personal representative specifically designated in the decedent’s will to administer Florida property;</div> OR <div style="margin-left: 40px;">The domiciliary personal representative of the decedent’s estate who is qualified to act in Florida;</div> OR <div style="margin-left: 40px;">The alternate or successor personal representative named in the will who is qualified to act in Florida;</div> OR <div style="margin-left: 40px;">A personal representative qualified to act in Florida who is selected by those entitled to the majority interest of the Florida property.</div>

	<p>If this is an intestate estate:</p> <p>The domiciliary personal representative of the decedent’s estate who is qualified to act in Florida;</p> <p>OR</p> <p>A personal representative who has order of preference for appointment as prescribed by the Florida Probate Code.</p>
	<p>The proposed personal representative has preference of appointment in accordance with the Florida Probate Code. If the proposed personal representative does not have preference, the Petitioner has filed the notarized renunciations or original death certificates that demonstrate the proposed personal representative is entitled to appointment.</p>
	<p>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. Probate Rule 5.200 as amended 11/4/2021</p>
	<p>The Petitioner filed original authenticated copies, as defined in 28 U.S.C. 1738, of the domiciliary proceedings. If testate, the authenticated copies of the domiciliary foreign proceedings include a petition for probate, an order admitting the will and/or codicils to probate, and the authority of the personal representatives. For intestate proceedings, the authenticated copies include the domiciliary foreign petition for administration and the authority of the personal representative to act.</p>
	<p>The Petition includes the names and addresses of the beneficiaries and their relationship to the decedent. If any beneficiary is a minor, the year of birth is included.</p>
	<p>The Petition includes a statement specifying whether domiciliary or principal proceedings from another state or country exist and the name and address of the foreign personal representative and the court issuing letters, if any.</p>
	<p>The Petition specifically describes the assets to be distributed, and includes values for each asset (e.g., name and address of the financial institution and the associated account number(s), legal property descriptions, etc.).</p>
	<p>An oath of personal representative and designation of resident agent were filed, and they comply with the applicable probate rules. Probate Rule 5.320 as amended 11/4/2021</p>

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 Ancillary Administration. 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 Ancillary Administration. 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____

ⁱ 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.