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| IN THE CIRCUIT COURT OF THE ELEVENTH JUDICIAL CIRCUIT,<br>IN AND FOR MIAMI-DADE COUNTY, FLORIDA<br>PROBATE DIVISION<br>IN RE: ESTATE OF _____<br>deceased.<br><br>Case no.: _____<br><br>Section: _____ | CC-SH2 |
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**Checklist and Certification - Summary Administration – Testate**

I, \_\_\_\_\_, as the Petitioner, have reviewed the instructions packet provided, and filed the following pleadings to the Clerk of Court's docket.

**REQUIRED DOCUMENTS**

The following documents must be gathered and filed. Be sure all requirements are met prior to filing, and do not submit documentation until you have collected all the requested documents. An attorney is not required, but it may be advantageous to consult with one.

☐ **An original or certified copy of Decedent's Death Certificate.** Death certificates can be obtained from Florida's Department of Vital Statistics by visiting [www.FloridaHealth.gov](http://www.FloridaHealth.gov) or by calling them at (305) 324-2400.

☐ **Decedent's Original Will and Testament:** You must deposit the original Will (and codicil, if any) with the clerk of courts. – Fla. Prob. R. 5.043

If the decedent's will is **NOT** self-proving:

☐ **Oath of Witness to Will:** Form SH-09. Only required if the decedent's Will is not self-proving under F.S. 732.503. The oath must be signed in front of a circuit judge or clerk of courts.

☐ **Proof of Will:** Form SH-08. Only required if the decedent's Will is not self-proving under F.S. 732.503 **AND** the witnesses to the will are unavailable. The affiant must sign in front of a circuit judge or clerk of courts.

☐ **Copy of death certificate for any deceased beneficiary.** You must file a copy of the death certificate for any beneficiary who is deceased. These do not need to be certified copies.

☐ **Copy of Decedent's funeral bill or signed affidavit from funeral detailing bill and payment.** If the decedent has been dead less than 2 years, you need to file copies of receipts or statements showing that the decedent's funeral bill has been paid in full.

## REQUIRED FORMS

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The following forms are included in the self-help packet and must be filled out before they are submitted.

- ☐ **Affidavit of Heirs** – Form SH-06. This form must be notarized prior to filing.
- ☐ **Notice of Related Cases** – Form SH-07.
- ☐ **Petition for Summary Administration (testate)** – Form SH-03 - Fla. Stat. 735.203 and Fla. Prob. R. 5.530.
- ☐ **Notarized Joinder, waiver, and consent** (if applicable) – Form SH-12. Must be signed by any beneficiary who is unable to sign the petition and must be notarized.
- ☐ **Proof of Formal Notice** (if applicable) – Form SH-11. Any known creditor of the estate and any beneficiary who does not sign the summary petition or does not file a joinder, waiver, and consent form, must be served with formal notice of the petition. If you are serving a known creditor or an unresponsive beneficiary with formal notice, you will need to file the required form and attach proof that the notice was received.
- ☐ **Order for Summary Administration (testate)** – Form SH-04. The plan of distribution in the order must match the plan of distribution in the petition.
- ☐ **Order Admitting Will to Probate** – Form SH-05.
- ☐ **This Checklist.** You must complete and file this checklist when submitting your order.

**I HEREBY CERTIFY** that I have complied with the above checklist and filed the required pleadings and supporting documentation on the date indicated above in accordance with applicable Florida Statutes, Florida Probate Rules, local rules, administrative orders, and administrative memoranda. I understand that submission of this checklist is considered an official statement subject to Fla. Stat. §837.06.

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Signature of Petitioner

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Date

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Printed Name of Petitioner

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Email Address

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Petitioner's Address

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Petitioner's Phone Number