

The ProDoc Probate system is based on the FLSSI<sup>1</sup> forms authored by the Forms Committee of the Real Property, Probate, and Trust Law Section of The Florida Bar. With more than 350 automated forms, this system supplies the most comprehensive probate tools for your practice. Our system covers everything from opening an administration to closing one, whether formal or abbreviated. Further, the volume contains both the official FLSSI versions and word processor versions, giving you the flexibility to meet the requirements of your cases and/or the court.

Interview Client Interview Sheet

## **GENERAL PROBATE RELATED FORMS**

1.0100 Petition to Open Safe Deposit Box  
 1.0110 Order to Open Safe Deposit Box  
 1.0300 Caveat by Creditor  
 1.0310 Caveat by Interested Person (Other than Creditor)  
 1.0400 Request For Notice and Copies  
 1.0500 Formal Notice  
 1.0501 Formal Notice (Adversary)  
 1.0510 Proof of Service of Formal Notice  
 1.0511 Proof of Service of Formal Notice - Adversary  
 1.0520 Notice of Action (Formal Notice by Publication)  
 1.0530 Notice of Hearing  
 1.0531 Notice of Hearing (Adversary)  
 1.0600 Consent and Waiver of Notice  
 1.0610 Consent and Waiver of Notice (Copy Attached)  
 1.0620 Joinder, Waiver and Consent  
 1.0630 Notice of Disqualification of Personal Representative  
 1.0640 Notice of Confidential Information Within Court Filing

## **FORMS FOR ABBREVIATED PROBATE PROCEEDINGS**

2.0100 Disposition of Personal Property without Administration-Verified Statement  
 2.0205 Petition for Summary Administration (Testate)  
 2.0215 Petition for Summary Administration (Intestate)  
 2.0220 Petition for Summary Administration (testate nonresident decedent)  
 2.0225 Petition for Summary Administration (intestate nonresident decedent)  
 2.0300 Order of Summary Administration (Testate)  
 2.0310 Order of Summary Administration (Intestate)  
 2.0320 Order of Summary Administration (testate nonresident decedent)  
 2.0325 Order of Summary Administration (intestate nonresident decedent)  
 2.0355 Notice to Creditors (Summary Administration)  
 2.0600 Order Admitting Will to Probate (Summary Administration)  
 2.0610 Order Admitting Will to Probate (Summary Administration - Self-Proved)  
 2.0800 Petition to Admit Foreign Will to Record  
 2.0810 Order Admitting Foreign Will to Record

## **OPENING FORMAL ADMINISTRATION**

3.0100 Petition for Administration (Testate) FL Resident-One Petitioner  
 3.0110 Petition for Administration (Testate) FL Resident-Mult Petitioners & One PR  
 3.0111 Petition for Administration (Testate) FL Resident-Mult Petitioners & PRs  
 3.0120 Petition for Administration (Intestate) FL Resident-One Petitioner  
 3.0130 Petition for Administration (Intestate) FL Resident-Mult Pets & One PR  
 3.0131 Petition for Administration (Intestate) FL Resident-Mult Pet & PRs  
 3.0140 Petition for Administration (Testate) NonResident-One Petitioner  
 3.0150 Petition for Administration (Testate) NonResident-Mult Pets & One PR  
 3.0151 Petition for Administration (Testate) NonResident-Mult Pet & PRs  
 3.0160 Petition for Administration (Intestate) NonResident-One Petitioner  
 3.0170 Petition for Administration (Intestate) NonResident-Mult Pets & One PR  
 3.0171 Petition for Administration (Intestate) NonResident-Mult Pet & PRs  
 3.0190 Waiver of Notice by Domiciliary Personal Representative

3.0200 Waiver of Priority, Consent to Appoint of PR, & Waiver of Notice & Bond  
 3.0210 Waiver of Priority, Consent to Appoint of PRs & Waiver of Notice & Bond  
 3.0300 Oath of Witness to Will  
 3.0301 Oath of Witness to Will (Copy)  
 3.0310 Oath of Witness to Codicil  
 3.0311 Oath of Witness to Codicil (Copy)  
 3.0320 Proof of Will (Witnesses Unavailable)  
 3.0330 Proof of Codicil (Witnesses Unavailable)  
 3.0350 Petition for Appointment of Commissioner  
 3.0360 Commission to Prove Will  
 3.0400 Order Admitting Will to Probate and Appointing One Personal Rep  
 3.0401 Order Admitting Will to Probate and Appointing Personal Rep (Corporate)  
 3.0410 Order Admitting Will to Probate and Appointing PRs (Multiple)  
 3.0420 Order Admitting Will to Probate and Appointing Personal Rep (Self-Proved)  
 3.0421 Order Admitting Will to Probate and Appointing PR (Self-Proved-Corporate)  
 3.0430 Order Admitting Will to Probate & Appointing PRs (Self-Proved--Multiple)  
 3.0440 Order Appointing Personal Representative (Intestate)  
 3.0441 Order Appointing Personal Representative (Intestate--Corporate)  
 3.0450 Order Appointing Personal Representatives (Intestate--Multiple)  
 3.0460 Order Admitting Codicil to Probate  
 3.0470 Order Admitting Codicil to Probate (Self-Proved)  
 3.0480 Order Admitting Will of NonResident to Probate and Appointing PR  
 3.0481 Order Admitting Will of Nonresident to Probate & Appointing PR (Corporate)  
 3.0490 Order Appointing Personal Representative of Nonresident (Intestate)  
 3.0491 Order Appointing Personal Representative of NonResident (Intestate-Corp)  
 3.0500 Petition to Waive Bond of Personal Representative  
 3.0510 Waiver of Bond by An Interested Party  
 3.0520 Bond of Personal Representative  
 3.0600 Oath of PR, Designation of Resident Agent & Acceptance  
 3.0610 Designation of Successor Resident Agent and Acceptance  
 3.0620 Oath of Corporate Personal Representative  
 3.0700 Letters of Administration (Single Personal Representative)  
 3.0710 Letters of Administration (Multiple Personal Representatives)  
 3.0720 Ancillary Letters of Administration  
 3.0802 Notice of Administration  
 3.0740 Notice to Creditors  
 3.0810 Waiver of Service of Notice of Administration (Testate)  
 3.0811 Receipt of Notice of Administration  
 3.0820 Waiver of Service of Notice of Administration (Intestate)  
 3.0830 Proof of Service of Notice of Administration  
 3.0831 Statement Regarding Creditors (Individual)  
 3.0832 Statement Regarding Creditors (Corporate)  
 3.0900 Inventory  
 3.0901 Inventory (Ancillary)  
 3.0905 Notice to Beneficiaries Regarding Inventory  
 3.0910 Request for Copy of Inventory  
 3.0920 Proof of Service of Inventory  
 3.0930 Petition to Extend Time for Filing Inventory  
 3.0940 Order Extending Time for Filing Inventory  
 3.0950 Notice of Federal Estate Tax Return Due

<sup>1</sup>The forms in this volume are derived from forms prepared by the Forms Committee of the Real Property, Probate, and Trust Law Section of The Florida Bar and contained in the Florida Lawyers Support Services, Inc. (FLSSI) Manual. These forms are created and maintained by leading experts in their field and recognized as the standard in probate courts throughout Florida.

- 3.1001 Personal Representative's Proof of Claim (Debts Paid)
- 3.1002 Personal Representative's Proof of Claim (Debts to be Paid)
- 3.1010 Statement of Claim
- 3.1020 Objection to Claim
- 3.1021 Objection to Personal Representative's Proof of Claim
- 3.1030 Proof of Service of Objection to Claim
- 3.1033 Notice to Creditor to File Petition for Extension
- 3.1041 Petition for Order Striking Untimely Filed Claim
- 3.1045 Order Striking Untimely Filed Claim
- 3.1050 Satisfaction and Release of Claim

**SPECIAL PROCEEDINGS**

- 4.0100 Petition for Allocation of Spouse's Share (Descendants)
- 4.0110 Order Allocating Spouse's Share (Descendants)
- 4.0200 Petition to Determine Exempt Property
- 4.0210 Order Determining Exempt Property (surviving spouse)
- 4.0220 Order Determining Exempt Property (children; no surviving spouse)
- 4.0300 Petition for Family Allowance
- 4.0310 Order Authorizing Family Allowance (periodic payments)
- 4.0311 Order Authorizing Family Allowance (Lump sum)
- 4.0400 Notice of Taking Possession of Protected Homestead
- 4.0410 Petition to Determine Homestead Status (Intestate)
- 4.0420 Petition to Determine Homestead Status (Testate)
- 4.0420A Pet to Det Homestead Status (Test-Others-Not Exempt) (NOT A FLSSI FORM)
- 4.0454 Order Determining Homestead Status (Intestate-Spouse-Exempt)
- 4.0456 Order Determining Homestead Status (Intestate-Descendants-Exempt)
- 4.0457 Order Determining Homestead Status (Intest-Spouse-Descend-Exempt)
- 4.0458 Order Determining Homestead Status (Intestate-heirs-no spouse-Exempt)
- 4.0462 Order Determining Homestead Status (Testate-Spouse-Descend-Exempt)
- 4.0463 Order Determining Homestead Status (Test-Minor Chld-No Spouse-Exempt)
- 4.0464 Order Determining Homestead Status (Testate-Spouse-Exempt)
- 4.0466 Order Determining Homestead Status (Testate-Heirs-Exempt)
- 4.0468 Order Determining Homestead Status (Test-Others-Not Exempt)
- 4.0540 Election to Take Elective Share
- 4.0545 Notice of Election to Take Elective Share
- 4.0550 Proof of Service of Notice of Election
- 4.0555 Order Determining Spouse's Entitlement to Elect. Share
- 4.0560 Pet. to Determine Amount of Elect. Share (no contrib)
- 4.0565 Order Determining Amount of Elect. Share (no contrib)
- 4.0570 Pet. to Determine Amount of Elect. Share (contrib)
- 4.0575 Order Determining Amount of Elect. Share (contrib)
- 4.0600 Declaration that Proceeding is Adversary
- 4.0610 Order that Proceeding is Adversary
- 4.0650 Notice of Civil Action
- 4.0700 Notice of Ancillary Administration
- 4.0800 Notice of Trust
- 4.0820 Petition for Order Designating Depository for Assets
- 4.0830 Receipt of Assets by Depository
- 4.0835 Acceptance and Certification by Depository
- 4.0840 Order Designating Depository for Assets

**CLOSING ADMINISTRATION**

- 5.0100 Petition to Extend Time for Filing Final Accounting and Pet for Discharge
- 5.0200 Order Extending Time for Filing Final Accounting and Petition for Discharge
- 5.0300 Notice of Interim Accounting
- 5.0340 Accounting Summary w/ Cover Page and Schedules A to E
- 5.0400 Petition for Discharge (One Personal Representative)
- 5.0401 Petition for Discharge (Multiple Personal Representatives)
- 5.0410 Notice of Final Accounting and Petition for Discharge
- 5.0411 Proof of Service of Notice of Final Accounting and Petition for Discharge
- 5.0420 Receipt of Petition for Discharge & Accounting & Consent to Distribution
- 5.0500 Waiver of Accounting and of Service of Petition for Discharge
- 5.0501 Waiver of Accounting and Service of Petition for Discharge, Distribution
- 5.0510 Receipt
- 5.0511 Receipt (with Refunding Language)
- 5.0520 Waiver of Accounting-Service of Petition for Discharge-Receipt-Consent
- 5.0530 Receipt of Beneficiary and Consent to Discharge

- 5.0550 Petition for Discharge (Full Waiver)
- 5.0551 Petition for Discharge (Full Waiver-Mult Personal Representatives)
- 5.0570 Waiver of Accounting, Receipt and Consent to Discharge (Full Waiver)
- 5.0600 Personal Rep's Release and Certificate of Distribution of Real Property
- 5.0605 PR's Release and Certificate of Distribution of Real Property (Mult PRs)
- 5.0610 PR'S Release & Certificate of Distribution of Real Property (Corporate PR)
- 5.0700 Report of Distribution (Single Personal Representative)
- 5.0701 Report of Distribution (Multiple Personal Representatives)
- 5.0800 Order of Discharge (Single Personal Representative)
- 5.0810 Order of Discharge (Multiple Personal Representatives)

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- 2.0355 Notice to Creditors (Summary Administration)
- 2.0600 Order Admitting Will to Probate (Summary Administration)
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- 3.0120 Petition for Administration (Intestate) FL Resident-One Petitioner
- 3.0130 Petition for Admin (Intestate) FL Resident-Mult Pets & One PR
- 3.0131 Petition for Administration (Intestate) FL Resident-Mult Pet & PRs
- 3.0140 Petition for Administration (Testate) NonResident-One Petitioner
- 3.0150 Petition for Administration (Testate) NonResident-Mult Pets & One PR
- 3.0151 Petition for Administration (Testate) NonResident-Mult Pet & PRs
- 3.0160 Petition for Administration (Intestate) NonResident-One Petitioner
- 3.0170 Petition for Admin (Intestate) NonResident-Mult Pets & One PR
- 3.0171 Petition for Administration (Intestate) NonResident-Mult Pet & PRs
- 3.0190 Waiver of Notice by Domiciliary Personal Representative
- 3.0200 Waive of Priority, Consent to Appoint of PR, & Waive of Notice & Bond
- 3.0210 Waive of Priority, Consent to Appoint of PRs & Waive of Notice & Bond
- 3.0300 Oath of Witness to Will
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- 3.0320 Proof of Will (Witnesses Unavailable)
- 3.0330 Proof of Codicil (Witnesses Unavailable)

- 3.0350 Petition for Appointment of Commissioner
- 3.0360 Commission to Prove Will
- 3.0400 Order Admitting Will to Probate and Appointing One Personal Rep
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- 3.0421 Order Admit Will to Probate and Appoint PR (Self-Proved-Corporate)
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- 3.0600 Oath of PR, Designation of Resident Agent & Acceptance
- 3.0610 Designation of Successor Resident Agent and Acceptance
- 3.0620 Oath of Corporate Personal Representative
- 3.0700 Letters of Administration (Single Personal Representative)
- 3.0710 Letters of Administration (Multiple Personal Representatives)
- 3.0720 Ancillary Letters of Administration
- 3.0740 Notice to Creditors
- 3.0802 Notice of Administration
- 3.0810 Waiver of Service of Notice of Administration (Testate)
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- 3.0905 Notice to Beneficiaries Regarding Inventory
- 3.0910 Request for Copy of Inventory
- 3.0920 Proof of Service of Inventory
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- 3.0950 Notice of Federal Estate Tax Return Due
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- 3.1002 Personal Representative's Proof of Claim (Debts to be Paid)
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- 3.1020 Objection to Claim
- 3.1021 Objection to Personal Representative's Proof of Claim
- 3.1030 Proof of Service of Objection to Claim
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- 4.0454 Order Determining Homestead Status (Intestate-Spouse-Exempt)
- 4.0456 Order Determining Homestead Status (Intestate-Descendants-Exempt)

- 4.0457 Order Determining Homestead Status (Intest-Spouse-Descend-Exempt)
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- 4.0545 Notice of Election to Take Elective Share
- 4.0550 Proof of Service of Notice of Election
- 4.0555 Order Determining Spouse's Entitlement to Elect. Share
- 4.0560 Pet. to Determine Amount of Elect. Share (no contrib)
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- 4.0570 Pet. to Determine Amount of Elect. Share (contrib)
- 4.0575 Order Determining Amount of Elect. Share (contrib)
- 4.0600 Declaration that Proceeding is Adversary
- 4.0610 Order that Proceeding is Adversary
- 4.0650 Notice of Civil Action
- 4.0700 Notice of Ancillary Administration
- 4.0800 Notice of Trust
- 4.0820 Petition for Order Designating Depository for Assets
- 4.0830 Receipt of Assets by Depository
- 4.0835 Acceptance and Certification by Depository
- 4.0840 Order Designating Depository for Assets

**CLOSING ADMINISTRATION - PDF**

- 5.0100 Pet to Extend Time for Filing Final Accounting and Pet for Discharge
- 5.0200 Order Extending Time for Filing Final Accounting & Pet for Discharge
- 5.0300 Notice of Interim Accounting
- 5.0340 Accounting Summary w/ Cover Page and Schedules A to E
- 5.0400 Petition for Discharge (One Personal Representative)
- 5.0401 Petition for Discharge (Multiple Personal Representatives)
- 5.0410 Notice of Final Accounting and Petition for Discharge
- 5.0411 Proof of Service of Notice of Final Accounting and Pet for Discharge
- 5.0420 Receipt of Pet for Discharge & Accounting & Consent to Distribution
- 5.0500 Waiver of Accounting and of Service of Petition for Discharge
- 5.0501 Waiver of Accounting and Service of Pet for Discharge, Distribution
- 5.0510 Receipt
- 5.0511 Receipt (with Refunding Language)
- 5.0520 Waiver of Accounting-Service of Pet for Discharge-Receipt-Consent
- 5.0530 Receipt of Beneficiary and Consent to Discharge
- 5.0550 Petition for Discharge (Full Waiver)
- 5.0551 Petition for Discharge (Full Waiver-Mult Personal Representatives)
- 5.0570 Waiver of Accounting, Receipt and Consent to Discharge (Full Waiver)
- 5.0600 Personal Rep's Release and Cert of Distribution of Real Property
- 5.0605 PR's Release and Cert of Distribution of Real Property (Mult PRs)
- 5.0610 PR'S Release & Cert of Distribution of Real Property (Corporate PR)
- 5.0700 Report of Distribution (Single Personal Representative)
- 5.0701 Report of Distribution (Multiple Personal Representatives)
- 5.0800 Order of Discharge (Single Personal Representative)
- 5.0810 Order of Discharge (Multiple Personal Representatives)

**MISCELLANEOUS FORMS (NOT FLSSIFIRMS)**

- 6.0100 DR-301, Preliminary Notice and Report
- 6.0200 DR-312, Aff-No FL Estate Tax Due (Probate cap)
- 6.0205 DR-312, Aff-No FL Estate Tax Due (Adversary cap)
- 6.0210 DR-312, Aff-No FL Estate Tax Due (No Caption)
- 6.0215 DR-313, Aff-No FL Est Tax, Fed Ret. Required (Prob cap)
- 6.0220 DR-313, Aff-No FL Est Tax, Fed Ret. Required (Adv cap)
- 6.0225 DR-313, Aff-No FL Est Tax, Fed Ret. Required (No cap)
- 6.0500 Estate Intake Form- Manual
- 6.0706 F-706, Florida Estate Tax Return
- 7.0100 Death Certificate Cover Sheet
- 7.0200 Proof of Service of Notice to Creditors
- 7.0300 Personal Representative's Deed
- 7.0305 Disclaimer of Interest in Property of Estate
- 7.0310 Petition to Sell Real Property
- 7.0315 Order Authorizing the Sale of Real Property

- 7.0320 Petition to Determine Beneficiaries
- 7.0325 Order Determining Beneficiaries
- 7.0330 Election to Take One-Half Interest in Homestead

**LOCAL FORMS (NOT FLSSI FIRMS)**

**SECOND CIRCUIT**

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- 102.100 Checklist for Opening Estate - Leon
- 102.105 Checklist for Closing Estate - Leon