

Florida Summary Administration Checklist (2026)

Petition signers, the creditor search, service and the optional notice to creditors under Fla. Stat. 735.201-735.2063

Use this after the route finder points you to summary administration: an estate of \$150,000 or less after exempt property (from July 1, 2026), or any size if the person died more than 2 years ago, and a will that does not direct administration as required by chapter 733.

CONFIRM ELIGIBILITY

- ☐ Will (if any) does not direct administration under chapter 733.
- ☐ Estate subject to administration in Florida, less exempt property, is \$150,000 or less, or the person died more than 2 years ago.
- ☐ Protected homestead and non-probate assets left out of the total.
- ☐ Checked whether the person received Medicaid after age 55 (AHCA estate claim, 409.9101).
- ☐ Asked the clerk for the current filing fee. Statute cap: up to \$340 for summary administration of an estate of \$1,000 or more, plus a \$4 service charge (28.2401).
- ☐ Asked the circuit court clerk what a self-represented filer must submit, or talked to a Florida attorney.

PETITION SIGNERS (735.203)

- ☐ Petitioner is a beneficiary or the person nominated as personal representative in the will.
- ☐ Surviving spouse, if any, signs and verifies the petition.
- ☐ Each beneficiary signs and verifies, unless receiving a full share under the proposed distribution.

Beneficiary not joining, and date formal notice was served: _____

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- ☐ Original will filed so it can be admitted to probate in the same case (735.206).

CREDITOR DILIGENT SEARCH LOG (735.206)

Creditor name / how found (mail, statements, credit report) / amount / date petition served / how payment is provided: _____

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☐ Every known or reasonably ascertainable creditor served with the petition, with provision for payment to the extent assets are available. A creditor left out can enforce the claim and recover attorney fees from those who joined the petition.

SERVICE LIST

Name / role (beneficiary, creditor) / address / date

served: _____

Name / role / address / date served: _____

Name / role / address / date served: _____

AFTER THE ORDER

☐ Certified copies of the order delivered to each bank or other holder of assets assigned in it.

☐ Optional: a person who obtained the order may publish a notice to creditors (735.2063) stating the estate's total value and who received what; file proof of publication. Creditors who are not known or reasonably ascertainable are then barred unless they file within 3 months after first publication.

☐ Recipients understand they are personally liable for a pro rata share of lawful claims, up to the value each received, and that 2 years after the death no one who received property is liable for a claim unless enforcement proceedings were started within that time (735.206).

Date of death + 2 years (general claims

cutoff): _____

INSTRUCTIONS FOR USE

Steps verified in October 2026 against Florida Statutes sections 735.201-735.2063 and 28.2401 (2026) and section 409.9101. This checklist is general information, not legal advice. Check your circuit court's own forms and checklists, and consult a licensed Florida attorney for advice on your situation.

Companion guide: clearlegaltips.com/florida-small-estate-affidavit/