

Probate Data Element Requirements

Accompanying authenticated documents of the domiciliary proceedings

Accounting - assets other than cash

Accounting - cash

Accounting - cash total

Accounting - net gain or (loss)

Accounting - other assets total

Accounting - total assets (must agree with the total for item VI on summary)

Accounting - total net gains and (losses)

Accounting period - date from

Accounting period - date through

Address of attorney for interested persons

Address of attorney for person giving notice

Address of attorney for personal representative

Address of attorney for petitioner

Address of attorney for surviving spouse

Address of attorney of ancillary personal representative

Address of attorney of personal representative

Address of claimant

Address of commissioner/officer

Address of Corporation

Address of creditor

Address of curator

Address of Decedent

Address of Depository

Address of direct recipient

Address of domiciliary PR

Address of interested party

Address of interested person

Address of lineal descendant

Address of person property validly devised to

Address of person property was validly devised to

Address of Person Served

Address of Person Serving

Address of Petitioner

Address of Proposed Commissioner

Address of proposed PR

Address of Resident Agent

Address of Successor Resident Agent

Address of surviving spouse

Address of trustee

Adversary Proceeding Case Number

Adversary Proceeding Petitioner Name

Adversary Proceeding Respondent Name

Affiant personally known to notary

Probate Data Element Requirements

Affiant place of residence of
Affiant post office address
Affiant produced identification
Affiant Signature
Amount Assigned
Amount of Bonus Spousal Share
Amount of contribution sought from specific recipient
Amount of elective share
Amount of elective share assigned
Amount of elective share requested
Amount of elective share surviving spouse as Signature
Amount of the claim
Amount requested
Amount to be received by surviving spouse
Ancillary personal representative Signature
Asset Description
Assets to be distributed to surviving spouse to satisfy elective share
Assets to be used to pay elective share
Assets to be used to satisfy elective share
Assigned Distribution
Attorney Address
Attorney Bar Number
Attorney for claimant Signature
Attorney for personal representative Signature
Attorney for petitioner Signature
Attorney for surviving spouse Signature
Attorney Name
Attorney Phone Number
Attorney Signature
Attorney Signature Block
Bank Official Signature
Basis for the claim
Begin Date
Beneficiary Address
Beneficiary Name
Beneficiary Signature
Bond Amount
Caption - party A primary name
Caption - party B primary name
Caption -court division
Case Number
Caveator resident agent name
Caveator resident agent's name
Caveator mailing address
Caveator name

Probate Data Element Requirements

Caveator residence address
Caveator resident agent address
Caveator resident agent county of residence
Caveator resident agent mailing address
Caveator resident agent signature
Caveator resident agent's address
Caveator resident agent's county of residence
Caveator resident agent's mailing address
Caveator resident agent's signature
Caveator signature
Caveator statement of interest
Claim contingent or unliquidated
Claim filing expiration date
Claim objected to
Claim omitted from personal representative proof of claim
Claim Status
Claimant served and failed to timely file claim
Claimant Signature
Claimant unknown to estate
Claims objected to
Clerk of court Signature
Clerk/Deputy Clerk Signature
Codicil Number
Condition of bond
Corporate personal company's name
Corporate personal rep - title
Corporate personal rep Id type
Corporate personal rep sign
Corporate personal rep title
Corporate representative Signature
County
Court Address
Court division - file number
Date Acceptance Signed by resident agent
Date ancillary administration commenced
Date approved
Date at which petitioner believes it will be possible to file a final Accounting and petition for discharge
Date civil action commenced
Date claim due
Date claim filed
Date claim paid
Date election filed
Date federal estate tax return due
Date filed

Probate Data Element Requirements

Date for distribution

Date for Extension

Date inventory extended to

Date Judge, clerk or deputy clerk Signed

Date Letters Issued

Date notarized

Date Oath of Witness was sworn

Date objection to claim filed

Date objection to claim served

Date of appointment

Date of birth

Date of clerk mailing

Date of codicil

Date of court order designating depository

Date of Death

Date of Deputy Clerk/witness signature

Date of Discharge

Date of Election

Date of extension

Date of Final Accounting

Date of first publication

Date of Hearing

Date of Letters Issued

Date of Petition for Discharge

Date of Receipt

Date of responsive pleading Service

Date of Service

Date of trust

Date of Weill

Date of will

Date Ordered

Date Served

Date Signed

Decedent Age

Decedent county

Decedent date of death

Decedent DOB

Decedent Domicile

Decedent had a will

Decedent last known address

Decedent Name

Decedent place of death

Decedent SSN

Decedent State of Residence

Decedent was survived by

Probate Data Element Requirements

Declarant Signature

Delete the following inapplicable provisions

Delivery receipts attached

Depository Signature

Deputy Clerk/witness signature

Deputy Clerk/Witness signature name

Deputy Clerk/Witness telephone number

Description of assets

Description of Adversary proceeding

Description of assets

Description of Assets on Hand at Close of Accounting Period

Description of Assets Received

Description of Capital Transactions and Adjustments

Description of Devise

Description of Disbursements

Description of Distributions

Description of exempt (protected) real estate in Florida

Description of exempt Assets

Description of exempt personal property

Description of non exempt Assets

Description of non-exempt homestead real estate in Florida

Description of Non-Exempt Personal Property

Description of Other Real Estate in Florida

Description of personal property in Florida

Description of personal property wherever located

Description of Property

Description of Real Estate in Florida

Description of Receipts

Description of use of funds

Description Other debts

Description Property Assigned

Disposition Request

Distribution Request

Domicile

Domiciliary PR Address

Domiciliary PR Name

Domiciliary proceedings

Domiciliary proceedings pending

Elective estate inventory attached

Employer Identification Number

End Date

Estimated fair market value of non-exempt real estate in Florida

Estimated fair market value of other real estate in Florida

Estimated fair market value of personal property in Florida

Estimated fair market value of personal property wherever located

Probate Data Element Requirements

Estimated fair market value of real estate in Florida
Exempt (protected) real estate in Florida
Exempt property consists of
Expected date inventory will be filed
Expiration date for filing claim
Federal Estate Tax Status
Filed timely claim
First Publication Date
Florida Bar Status
Funeral Service Provider Name
Funeral Service Status
Funeral Service Value
Hearing Time
Homestead property description
Interested party's interest in the estate
Interested Person Address
Interested person address inventory should be served
Interested person attorney Signature
Interested Person Name
Interested Person Signature
Interested persons
Inventory due date
Is the claim secured
Is the personal representative in possession of the personal property
Judge Name
Judge Name signature
Judge Name, clerk or deputy clerk
Judge Name, clerk or deputy clerk which approved bond
Judge Signature
Judge, clerk or deputy clerk Signature
Judicial Assignment
Last known address of decedent
Last known residence of decedent
Legal Description of property
Liens on assets
Limited purpose for taking possession of property
Lineal Descendent
List of assets and estimated value
List of assets and estimated value (non-exempt)
Location of death
Location of Hearing
Location of original probate proceedings
Manner of distribution
Matter to be heard
Mortgage on assets

Probate Data Element Requirements

Name and title of proposed commissioner

Name of affiant

Name of affiant to non self-proving will

Name of ancillary personal representative

Name of ancillary personal representative signature

Name of attorney for ancillary personal representative signature

Name of attorney for claimant signature

Name of attorney for declarant

Name of attorney for interested person signature

Name of attorney for objector signature

Name of attorney for person giving notice

Name of attorney for personal representative

Name of attorney for personal representative Signature

Name of attorney for personal representative/petitioner signature

Name of attorney for petitioner signature

Name of attorney for surviving spouse

Name of attorney for surviving spouse signature

Name of attorney if fact for surety

Name of attorney Petitioner signature

Name of attorney signature

Name of claimant

Name of claimant signature

Name of claimants attorney served objections on

Name of clerk of court

Name of clerk or deputy clerk signature

Name of Clerk/Deputy Clerk

Name of commissioner/officer

Name of corporate personal representative

Name of corporation

Name of corporation if personal representative is corporate

Name of county

Name of county in which court is located

Name of court

Name of creditor

Name of curator

Name of declarant

Name of Depository

Name of domiciliary PR

Name of filing

Name of Florida notary

Name of Interested Person

Name of lessor

Name of lineal descendant

Name of medical and/or hospital services provider

Name of objector

Probate Data Element Requirements

Name of objector signature

Name of other attesting witnesses

Name of person property validly devised to

Name of person property was validly devised to

Name of person served

Name of person serving

Name of person that has an interest in the proceeding

Name of person who has a claim to the estate

Name of previous resident agent

Name of Principal

Name of proposed PR

Name of Recipients from whom contributions will be required

Name of resident agent

Name of respondent

Name of successor resident agent

Name of Surety

Name of surviving spouse

Name of surviving spouse signature

Name of Testator

Name of the parties to the civil action

Name of Trustee

Name of under Signature

Name(s) of child/children of decedent

Names of direct recipient

Names of Heir

Nature of Assets in the Estate

Nature of claim

Nature of the ancillary assets

Nature of the proceeding

Non Florida real estate

Non-exempt homestead real estate in Florida

Notary - county

Notary - date

Notary - decedent name

Notary - personal rep - identification type

Notary - personal representative identification type

Notary - personal representative known to me - yes or no

Notary - personal representative name

Notary - Signature

Notary - Type of identification

Notary - verification date

Notary Date

Notary Seal

Notary Signature

Number of adversary proceedings

Probate Data Element Requirements

Number of codicil

Other attesting witness name

Parcel ID number

Payee

Person entitled to exempt property

Personal property in Florida

Personal Representative Address

Personal Representative Name

Personal Representative Signature

Petition filed within time permitted by section 732.402(6) of the Florida Probate Code

Petitioner Address

Petitioner Name

Petitioner / Personal Representative - Address

Petitioner / Personal Representative - Name

Petitioner Address

Petitioner appointed personal representative

Petitioner Attorney name

Petitioner attorney Signature

Petitioner believes the property was validly devised because

Petitioner has possession of estate assets

Petitioner Interest in Estate

Petitioner is unaware of any other unrevoked wills or codicils

Petitioner Name

Petitioner post office address

Petitioner residence address

Petitioner Signature

Place of Death

Place where will was executed

Plan of Distribution

Powers of Curator

Property Assigned

Property for computing elective share

Reason for disqualification

Reason for Extension

Reason inventory was not filed

Receipts attached

Reporting Period Schedule A

Reporting Period Schedule B

Reporting Period Schedule C

Reporting Period Schedule D

Reporting Period Schedule E

Requested Date for extension

Resident Agent Signature

Resident Agent Status

Probate Data Element Requirements

Restrictions to Letters of Administration
Safe deposit box number
Security for the claim
Security interest on assets
Share of property lineal descendant received
Share of property validly devised
Share of property validly devised person received
Short Form of Acknowledgment /notary page (F.S. 695.25)
Signature of person giving notice
State where ancillary administration is pending
State where civil action is pending
State where commissioner is authorized
Statement of claims against estate
Statement of eligibility for admission of Foreign Will
Statement of Entitlement to appointment
Statement of entitlement to be appointed PR
Statement of entitlement to summary administration
Statement of existence of will
Statement of Existence of Wills
Statement of how property devised in will or codicil
Statement of Interest
Statement of Interest in Estate
Statement of interest of petitioner
Statement of qualification for Summary administration
Statement of relationship
Statement of signer's fiduciary capacity
Statement of status of attesting witnesses
Statement of Venue
Statement order of distribution to cuban blocked account
Statement regarding claims against estate
Statement requiring cuban blocked account
Statement showing venue
Status of Administration
Status of medical and/or hospital services provider
Status Other debts
Successor resident agent county of residence
Successor resident agent Signature
Summary - Assets on hand at close of Accounting period - income
Summary - Assets on hand at close of Accounting period - principal
Summary - assets on hand at close of Accounting period - totals
Summary - Capital transactions and adjustments - principal
Summary - Capital transactions and adjustments - totals
Summary - disbursements - income
Summary - disbursements - principal
Summary - disbursements - totals

Probate Data Element Requirements

Summary - distributions - income

Summary - distributions - principal

Summary - distributions - totals

Summary - receipts - income

Summary - receipts - principal

Summary - receipts - totals

Summary - starting balance - income

Summary - starting balance - principal

Summary - starting balance - totals

Surety Signature

Surviving Dependent Name

Surviving spouse Signature

Time of distribution

Time to be distributed

Title of corporate personal representative

Title of Depository

Title of Trust

Total Distribution

Total fair market value of all Florida real and personal property

Total fair market value of all personal property and non-exempt Florida real estate

Total fair market value of non-exempt real estate in Florida

Total fair market value of personal property in Florida

Total fair market value of real estate in Florida

Total value of assets

Total value of estate

Trustee Signature

Type of claim

Type of inventory

Type of service

Valid claims paid

Valid claims payable

Value of Assets in the Estate

Value of exempt assets

Value of exempt personal property

Value of Homestead Property

Value of medical and/or hospital services provider

Value of non-exempt assets

Value of non-exempt personal property

Value of property on date of death

Value of the ancillary assets

Value Other debts

Value Property Assigned

Verification-date

Witness address

Probate Data Element Requirements
Witness Name
Witness Signature