

**ESTATE AUDIT FOR DISCHARGE**

RE: ESTATE OF:

UCN:

REF#

STATUS	N,Y,N/A, W	COMMENTS
Will		
Ancillary		
Dcrt/date of death /		Spouse:
Inventory		
<b>IF DECEDENT OVER 55:</b> Proof of Service of Notice to Creditors or Notice of Admin to Agency for Health Care Admin		(does not apply to cases filed prior to 2001)
Cert of Service for Dept of Revenue re: Notice to Creditors or copy of inventory		
Order Determine Homestead		
Final Accounting		
Final Notice		Expires on:
Petition for Discharge		
Schedule of Distribution		
Receipts of beneficiaries		
Proposed Order of Discharge		

**CLAIMS:**

Time to file expired:	# paid	# withdrawn
Time to object expired on:	# late/order striking	# amended
# filed	# objected to/proof of service	# duplicates

**TAX CLEARANCE**

Fed estate tax return req	Estate Tax Closing Letter <input type="checkbox"/> yes	Proof of Payment <input type="checkbox"/> yes	\$
State of Florida tax clearance			

**CAUTION REGARDING DISTRIBUTION**

	Y		Y	
Predeceased (except spouse)	<input type="checkbox"/>	DCRT:	Disclaimer/Assignment	<input type="checkbox"/> Filed on
Died during Administration	<input type="checkbox"/>	Qualification	Pretermitted Spouse/Child	<input type="checkbox"/>
Minors	<input type="checkbox"/>	Qualification	ElectiveShare/ Court Order	<input type="checkbox"/> Filed on
Incapacitated	<input type="checkbox"/>	Qualification	Agreement of Beneficiaries	<input type="checkbox"/> Filed on
Receipt by POA	<input type="checkbox"/>	POA filed	Litigation/Outcome Filed	<input type="checkbox"/> Filed on:

<b>DOCUMENTS NEEDED:</b>	<b>BENEFICIARIES/NOTES:</b>
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PENDING JUDICIAL REVIEW

WILL REVIEW IN 60 DAYS

Audit date:	CLAC/	Initial time expired:
Audit date:	CLAC/	PDIS Tick to:
Final Audit date:	CLAC/	All ticks updated/removed:
<input type="checkbox"/> Order of Discharge forwarded to Judge on		

CWSA – ESCK rev 2/28/08 Note: CLAC = clerks' audit completed PDIS = Petition for discharge ODIS = Order of Discharge  
R = Receipt filed W = Waiver of filing final accounting and final notice C = Consent to discharge w/o further notice, hearing or waiting period