"Exhibit D"

IN THE CIRCUIT COURT IN AND FOR ORANGE/OSCEOLA COUNTY, FLORIDA

CHECKLIST FOR DETERMINING HOMESTEAD STATUS OF REAL PROPERTY IN FORMAL AND SUMMARY ADMINISTRATION

Estate of: _____ **Case No:** _____

Date of Death: _____ **Attorney of Record:** _____

Age at Death: _____ **Marital Status:** _____

Decedent's Residence as Listed on Death Certificate:

_____

Type of Estate: Testate ☐ Intestate ☐

NOTE TO COUNSEL: Please fill out <u>both</u> columns of this checklist completely to assist the court in processing your client's pleading. <u>If you do not provide correct dates in the Date Filed column for each item where a "YES" answer is provided, the checklist will be incomplete and the court will deny the petition on that basis.</u>

		Attorney Certification			CONFIRMATION BY COUNSEL
		YES	NO	N/A	DATE FILED
1.	**Certified Death Certificate Filed?**	☐	☐	☐	
2.	**Last Will and Testament**				
	Original Will filed?	☐	☐	☐	
	Date of Will: _____ Date of Codicil: _____	Fill in information to left			
	If applicable, Notice of Trust # _____ Deposited Will # _____ 732.901 Guardianship # _____ Caveat # _____ 731.110 [If caveat has been filed, notify attorney, must serve formal notice on the Caveator before further action can be taken on Petition for Summary 5.260(f); If a creditor-send Notice to Caveator when Letters are issued 5.260(e)]	Fill in information to the left, if applicable			
	If a copy is filed, a petition to establish lost will complying with 5.510 & 5.025 and 733.207 has been filed?	☐	☐	☐	
	Will is self-proved? 732.503, 733.201 If applicable, ☐ self-proved under law where executed; ☐ authority provided from other state where executed	☐ If yes, mark boxes on left	☐	☐	

Revised October 31, 2022

		Attorney Certification			CONFIRMATION BY COUNSEL
		YES	NO	N/A	DATE FILED
	If not self-proved, an oath of witness is filed? 733.201(2)				
	Properly executed? 732.502				
	If not, proper oath? 733.201(2) / (3)				
3.	**Does the Petition for Determining Homestead Status of Real Property Contain the Following Information? FPR 5.405(b)**				
	(1) the date of decedent's death				
	(2) the county of the decedent's domicile at the time of death;				
	(3) the name of the decedent's surviving spouse/descendants; and whether they are minor children, identified with name and year of birth;				
	(4) a Legal description of the property owned and resided on by the decedent;				
	Whether the real property constituted the protected homestead of the decedent; 5.405(c)				
	Formal Notice or Consent by interested parties 5.040/5.041				
4.	**List of Beneficiaries:**				
5.	**List of Creditors:**				

6.		YES	NO	N/A	CONFIRMED
	Intestate: F.S.732.401(1) Does the Proposed Order provide for a Life Estate for Spouse? Affidavit of Heirs filed if Pro Se or if represented in an intestate estate as required by the judge in Orange or Osceola County?				
		YES	NO	N/A	CONFIRMED
	Testate: F.S.732.4015(1) Is there a Surviving Spouse or minor child?				

		Attorney Certification			CONFIRMATION BY COUNSEL
		YES	NO	N/A	DATE FILED
7.	**For Formal Administration only:** Three (3) months have passed after publication. Verified Statement Regarding Creditors filed. Notice to Creditors to AHCA (>55yo)	YES	NO	N/A	CONFIRMED
		☐	☐	☐	
		☐	☐	☐	
		☐	☐	☐	
8.	**Is the Petition Properly Executed?**				
	☐ Verified ☐ Signed by Petitioner ☐ Signed by attorney 5.020(a)	**Fill in applicable information to the left**			
9.	**Miscellaneous**				
	Has formal notice been served on any heir, beneficiary, or creditor not joining or consenting to the Petition?	☐	☐	☐	
	Affidavit of Heirs filed only if intestate – must be in the form required by Administrative Order No. 2022-08	☐	☐	☐	
	If testate, WILL does not direct sale—becomes non-exempt [Price 513//767; Knadle 686//681]	☐	☐	☐	
10	**Proposed Order Determining Homestead Status of Real Property filed?** ☐ Shall describe real property (includes complete legal description); ☐ Shall determine whether real property constituted homestead of decedent; ☐ Identifies by name the person(s) entitled to homestead; ☐ Defines the interest of person(s) receiving the protected homestead; ☐ Finds that the homestead property descended to or was validly devised.	**Fill in applicable information to the left**			

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I certify that I have personally reviewed the foregoing checklist and it is accurate. I have included the dates of the pleadings in this checklist. In making this certification, I have relied upon the information set forth in the pleadings and court filings.

Signature of Attorney for Estate: _____

Printed Name of Attorney for Estate: _____

Date: _____ **Phone Number:** (_____) _____

Mailing Address: _____

City: _____ **State:** _____ **Zip:**_____

Email address: _____