



Doug Chorvat, Jr.

Clerk of Circuit Court & Comptroller - Hernando County
20 N. Main Street, Brooksville, FL 34601 - (352) 754-4201

SMALL ESTATE LETTER REQUIREMENTS

***ALL QUESTIONS MUST BE ANSWERED.
IF AFFIDAVIT IS INCOMPLETE, IT WILL BE RETURNED***

- \$231.00 FILING FEE
- TOTAL VALUE OF ASSETS SOUGHT TO BE TRANSFERRED CANNOT EXCEED \$5,000.00 AND CANNOT BE REAL PROPERTY
- DECEDENT MUST HAVE BEEN A RESIDENT OF HERNANDO COUNTY AT THE TIME OF HIS/HER DEATH
- DEATH CERTIFICATE MUST STATE HERNANDO COUNTY AS RESIDENCE
- DEATH CERTIFICATE(S) MUST ACCOMPANY AFFIDAVIT
 - IF AN ASSET IS IN THE NAME OF MORE THAN ONE PERSON, A DEATH CERTIFICATE MUST BE PROVIDED FOR EACH PERSON AND MUST ACCOMPANY THE AFFIDAVIT
- ORIGIN LAST WILL & TESTAMENT
- COPY OF TRUST (IF APPLICABLE)
- PAID FUNERAL BILL
- A COPY OF THE PROOF OF THE VALUE OF THE ASSETS MUST BE FILED WITH THE AFFIDAVIT (i.e., LAST BANK STATEMENT, COPY OF INSURANCE POLICY, STATEMENT, OR COPY OF BONDS, etc. (Whichever applies))
- PETITIONER MUST PROVIDE COMPLETE NAME & ADDRESS OF THE INTENDED RECIPIENT OF THE SMALL ESTATE LETTER.
 - MUST INCLUDE THE AMOUNT INVOLVED AND THE ACCOUNT NUMBER ON LETTERHEAD OF CORRESPONDENCE (IF NO STATEMENTS AVAILABLE)
- IF THERE IS NO NOMINATED PERSONAL REPRESENTATIVE IN DECEDENT'S WILL, THE PETITIONER MUST PRESENT NOTARIZED AUTHORIZATION FOR REQUESTING A SMALL ESTATE LETTER FROM ALL HEIRS AT LAW OF THE DECEDENT.
- IF THE ASSETS SOUGHT TO BE TRANSFERRED WITH A SMALL ESTATE LETTER ARE HELD BY MORE THAN ONE AGENCY, ONLY TWO LETTERS WILL BE PROVIDED.
- VALID DRIVER'S LICENSE OR STATE ID CARD FOR PERSON COMPLETING SMALL ESTATE PAPERWORK.

FIFTH JUDICIAL CIRCUIT
IN AND FOR HERNANDO COUNTY
STATE OF FLORIDA
PROBATE DIVISION

CASE NO: _____

STATE OF FLORIDA
COUNTY OF HERNANDO

IN RE: _____
DECEASED

AFFIDAVIT

Before me the undersigned personally appeared _____ in
_____ where under oaths and all penalties of
perjury, swore and affirmed as follows:

NAME OF PETITIONER

Name of Petitioner(s) _____

Address _____

Telephone Number _____

E-mail address _____

Social Security Number _____

Relationship to the deceased _____

DEATH CERTIFICATE

Name of deceased _____

When did deceased pass _____

Deceased residential address _____

Has death certificate of deceased been filed Yes No

If yes, when _____ where _____

Is it attached to this petition? _____

If no, why not _____

LAST WILL AND TESTAMENT

Did the deceased have will _____

If yes, have you found the last will _____

Are you sure you have found the last will _____

If yes, when _____ where _____

Is the will attached to this petition? _____

If no, why not _____

NO WILL

Are you positive there is no will _____

Why are you so positive? _____

HEIRS AT LAW

List the names, address and approximate ages of the deceased spouse, children, and parents:

<u>Name</u>	<u>Address</u>	<u>Age</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

PROBATE OR ADMINISTRATION PLANNED

If you are the personal representative named in the will or the surviving spouse or next of kin of the deceased, is any formal administration (of any type or form) of the estate of the deceased being contemplated? Yes No What is planned? _____

If no, why not _____

If no administration is planned, what do you request from the court?

Why do you request this relief from the court?

What authority do you have to request such relief?

What is the amount of money (or value) involved that you desire a Letter issued on?

Describe in detail the item(s) that you desire the Letter issued (provide complete description and your basis for requesting same, along with name, address (local address if possible) and account number of recipient letter):

Are there any debts of the deceased: No Yes

List of debts and amounts:

Under penalties of perjury, I swear the above is true and correct.

Affiant (Petitioner) (**Signed before Clerk/Notary**)

STATE OF FLORIDA
COUNTY OF HERNANDO

The foregoing instrument was acknowledged before me this _____ day of _____, 20____, who is personally known to me or who has produced _____ as identification and who did take an oath.

Deputy Clerk/ Notary Public