



# Don Barbee, Jr.

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

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## **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 \_\_\_\_\_

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**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 \_\_\_\_\_

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**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 \_\_\_\_\_

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**NO WILL**

Are you positive there is no will \_\_\_\_\_

Why are you so positive? \_\_\_\_\_

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**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>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

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**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 \_\_\_\_\_

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

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Why do you request this relief from the court?

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What authority do you have to request such relief?

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

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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):

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Are there any debts of the deceased:  No  Yes

List of debts and amounts:

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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