

# 900 Florida Forms with Step-by-Step Procedures

Prepare documents quickly and correctly with this practice-proven resource

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This book-and-CD package provides litigation and transactional forms with completion instructions and filing procedures. Each of the more than 900 forms on CD comes with a quick-reference procedure section in print that details:

- Whom to serve
- Who receives copies
- Other filing requirements and fees
- How many copies to make
- Cross-references to related procedural explanations
- Additional documents to prepare

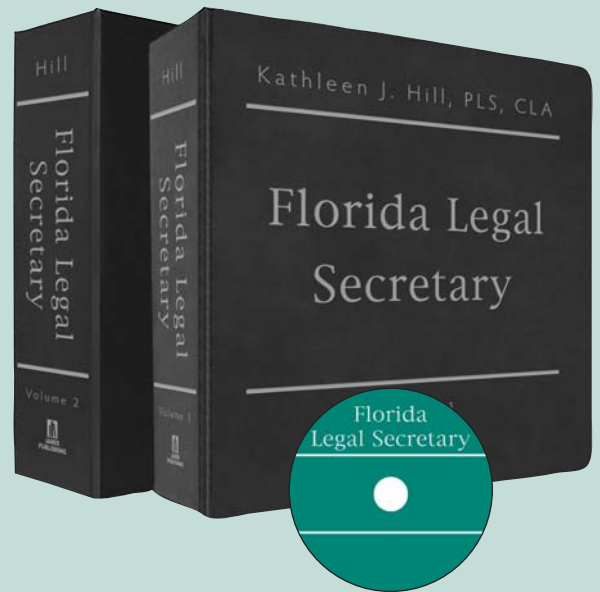
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## Comprehensive Coverage of Seven Major Topics

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- Real Estate
- Business Organization
- Civil Litigation
- Dissolution of Marriage
- Guardianship
- Criminal Law
- Estate Planning and Administration

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— L.M., Miami

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### Paralegals

“I cannot tell you how invaluable these volumes have been to me in the years I have spent in the legal field.”

— B.P., St. Petersburg

### Legal Secretaries

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— A.L., West Palm Beach

### Attorneys

“*Florida Legal Secretary* should have its title amended to Florida Attorney’s Handbook.”

— M.B., Ft. Lauderdale

# Partial List of 900 Forms on CD

IN THE CIRCUIT COURT OF THE  
JUDICIAL CIRCUIT, IN AND FOR  
COUNTY, FLORIDA  
PROBATE DIVISION File #  
IN RE: THE ESTATE OF  
Decedent.

## PETITION FOR DISCHARGE

Petitioner, \_\_\_\_\_, as personal representative of the above estate alleges:

1. The decedent, \_\_\_\_\_, a resident of \_\_\_\_\_ County, Florida, died on \_\_\_\_\_, 20\_\_\_\_, and Letters of Administration were issued to petitioner on \_\_\_\_\_, 20\_\_\_\_.

2. Petitioner files herewith either a Final Accounting containing a complete report of all cash and property transactions and of all receipts and disbursements since the commencement of administration of this estate, or, in the date of the last accounting filed herein, if any, or waivers signed by all interested persons, other than petitioner, waiving the filing of a final accounting.

3. Petitioner has fully administered this estate by making payment, settlement, or other disposition of all claims and debts that were presented, and paying or making provision for the payment of all taxes and expenses of administration.

4. Petitioner has filed all estate tax returns with the Internal Revenue Service and with the Department of Revenue of the State of Florida, and has obtained and filed with this court evidence of the satisfaction of this estate's obligations for both federal and Florida estate taxes, if any.

5. The amount of compensation paid or to be paid to the personal representative, attorneys, accountants, appraisers, or other agents employed by personal representative, and the manner of determining that compensation, is forth in Exhibit A attached hereto.

5-87 Estate

### §574.5 Letters of Administration (FS §733.212; FPR)

The letters of administration will after the petition has been filed, the will proven and admitted to probate, the personal representative has been appointed, the bond approved, and the oath has been taken. The representative cannot officially begin his duties until the letters have been issued. Proceedings before the issuance of letters, who is served with formal notice of the administration prior to the issuance of letters has waived notice may challenge:

- the validity of the will,
- the testacy of the decedent,
- qualifications of the personal representative,
- venue, or
- jurisdiction of the court.

The attorney should prepare the letters for the court's signature. Prepare one original for the court's signature and one copy for the file. After the letters have been signed and filed, make photocopies of the signed letters for all parties and obtain certified copies for the personal representative. The personal representative will require certified copies in order to open a bank account, make or sell investments, or sell, mortgage, or buy property on behalf of the estate. These letters represent his authority to manage the estate.

### Forms on CD

- Letters of Administration
- Ancillary Letters of Administration

See blue pages for instructions on using CD.

### §574.6 Notice of Administration (FS §733.212; FPR 5.240)

The personal representative must "promptly" serve, by formal notice, a copy of the notice of administration on the following persons who are known to the personal representative and who were not previously served under FS §733.212 (service on interested persons before issuance of letters of administration):

1. The decedent's surviving spouse;
2. Beneficiaries;
3. The trustee of any trust described in FS §737.303(4)(b), and each beneficiary of the trust as defined in FS §737.303(4)(b), if the trustee is also a personal representative of the estate; and
4. Persons who may be entitled to exempt property.

### IN THE MATTER AND INTEREST OF THE PERSONAL REPRESENTATIVE'S ESTATE

Additionally, the notice must state:

- That any interested person on whom the notice is served who challenges the validity of the will, the qualifications of the personal representative, venue, or jurisdiction of the court is required to file any objections with the court within three months after the date of service of the notice or those objections will be forever barred.
  - That any person entitled to exempt property is required to file a petition for determination of exempt property within the time provided by law or the right to exempt property is deemed waived.
- Unless otherwise directed by the court, the personal representative of a testate estate must, upon written request, furnish a copy of the will and all codicils admitted to probate to any person on whom the notice of administration was served.
- Any interested person filing an objection must file a petition or other pleading within three months after the date of service of a copy of the notice of administration on the objecting person, or those objections are forever barred. The appointment of a personal representative or a successor personal representative will not extend or renew the period for filing objections unless a new will or codicil is admitted.
- Objections to the validity of the will, the qualifications of the personal representative, or the venue or jurisdiction of the court must follow the form and procedure set forth in the Florida Rules of Probate and Guardianship Procedure.
- The personal representative will not be individually liable to any person for giving notice of the administration of an estate, regardless of whether it is later determined that notice was not required by statute. Service of notice may not be construed as conferring any right. Also, if the personal representative in good faith fails to give notice, she will not be liable to any person for the failure and liability, if any, for the failure to give notice will be on the estate.

### Corporation Election

- Exhibit C — Election of Section 248
- Exhibit D — Corporate Banking Resolution
- Form 55-4 — Application for Employer Identification Number

## Estate Forms

Durable Power of Attorney, Living Will, Estate Plan Data Sheet, Last Will and Testament, Codicil, Testamentary Trust, Irrevocable Charitable Trust, Irrevocable Gift Trust Agreement, Grantor Retained Annuity Trust, Revocable Trust

Petition to Determine Exempt Property, Disposition of Personal Property Without Administration, Probate Schedule, Petitions for Family Administration, Petitions for Summary Administration, Notice to Creditors, Orders Admitting Will to Probate

Checklist for Formal Administration, Petition for Administration, Formal Notice of Petition for Administration, Order Admitting Will to Probate and Appointing Personal Representative, Letters of Administration, Statement Regarding Creditors, Inventory, Statement of Claim, Objection to Claim

Petition to Enforce Payment of Claim, Petitions for Allocation of Spouse's Share, Petition for Determination of Elective Share, Petition to Determine Homestead Status of Real Property, 8 Orders to Determine Homestead Status of Real Property, Petition Determining Exempt Property

Final Accounting of Personal Representative, Schedules A-F, Petition for Discharge, 4 Waivers of Accounting, 3 Personal Representative's Certificate of Distribution, Order of Discharge

### BUSINESS ORGANIZATION 5213

#### §213.5 Corporate Shares; Stock Certificates (FS §5607.6601-.6626)

#### §213.5.1 Corporate Shares

The articles of incorporation must describe the classes of shares and the number of shares of each class that the corporation is authorized to issue. If more than one class of shares is authorized, the articles of incorporation must provide a distinguishing designation for each class. Before issuing shares of a class, the preferences, limitations, and relative rights of that class must be described in the articles. All shares of a class must have preferences, limitations, and relative rights identical with those of other shares of the same class (except as otherwise permitted by law).

The articles of incorporation must authorize:

- (1) One or more classes of shares that together have unlimited voting rights, and
- (2) One or more classes of shares which may be the same class or classes as those with voting rights that together are entitled to receive the net assets of the corporation upon dissolution.

The articles may authorize one or more classes of shares that (a) have special, conditional, or limited voting rights, or no right to vote, except to the extent prohibited by law; or (b) are noncumulative or convertible as specified in the articles of incorporation; or (c) entitle the holders to distributions calculated in any manner, including dividends that may be cumulative, noncumulative, or partially cumulative; or (d) have preference over any other class of shares with respect to distributions, including dividends and distributions upon the dissolution of the corporation.

Shares which are entitled to preference in the distribution of assets or dividends may not be designated as "common" shares. Shares which are not entitled to preference shall be "common" shares and may be designated as "preferred" shares. FS §5607.6601(1)(a).

The corporation may issue the number of shares of each class or series authorized by the articles of incorporation, or it may issue less than the number of shares of a class or series if the shares are not listed in the articles of incorporation, or if the shares are listed in the articles of incorporation but the articles of incorporation do not contain a provision that the annual meeting must state shareholder action. The annual meeting must state:

Board of Directors

Line of Resolution

Section 248

### TICKLER/CHECKLIST FOR INCORPORATION

- Confirm information on Information Sheet (see 5213)
- Call Secretary of State re: name availability
- Reserve corporate name (check for 5213)
- Soft incorporation documents:
- Articles of Incorporation \_\_\_\_\_
  - Bylaws \_\_\_\_\_
  - Minutes & Waiver \_\_\_\_\_
  - Consent or Assignment \_\_\_\_\_
  - Subscriptions \_\_\_\_\_
  - Indem. \_\_\_\_\_
  - Stock \_\_\_\_\_
  - Stock \_\_\_\_\_
  - Consent to \_\_\_\_\_
  - Certificates \_\_\_\_\_
  - Receipts \_\_\_\_\_
- Other Documents:
- View Documents \_\_\_\_\_
  - Prepare miscellaneous forms: \_\_\_\_\_
  - Corporate Data Sheet \_\_\_\_\_
  - Checklist f \_\_\_\_\_
  - Annual Meet \_\_\_\_\_
  - App'l for FEIN \_\_\_\_\_
  - Year-End Ti \_\_\_\_\_
  - App'l for Sales \_\_\_\_\_
  - Subscriber \_\_\_\_\_
  - App'l for Bu \_\_\_\_\_
  - Tax \_\_\_\_\_

The first meeting of the board of directors of \_\_\_\_\_ was held at \_\_\_\_\_, Florida, on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, at \_\_\_\_\_.

The meeting was called to order by \_\_\_\_\_, the sole director as elected by the shareholders of the corporation.

By motion duly made, seconded, and carried, \_\_\_\_\_ was chosen as chairman and \_\_\_\_\_ was chosen as secretary of the meeting. The positions were accepted by the persons who then proceeded to carry out their duties.

The chairman announced that the meeting was to be held in compliance with Florida Statutes.

The Secretary presented a proposed form of bylaws for the regulation and management of the affairs of the Corporation, the bylaws having been approved by the shareholders, which was read, section by section. Upon motion duly made, seconded, and unanimously carried, the following resolution was passed:

RESOLVED that the proposed bylaws as adopted by the incorporators be adopted as the rules of the Corporation.

The chairman called for the nomination of officers. The following persons were nominated for officers of the Corporation, to serve for the term provided in the bylaws:

adopted:

President/Vice President \_\_\_\_\_

Secretary/Treasurer \_\_\_\_\_

Upon motion duly made, seconded, and approved, the nominees were elected by acclamation to serve for the term provided in the bylaws.

## Business Forms

Tickler/Checklist for Incorporation, Checklist for the Formation of a Small Closely-Held Corporation, Areas to be Discussed with Corporate Bookkeeper, Letter Reserving a Corporate Name, Name Reservation – Registration with Trade-Service Mark, Mark Renewal Application

Instruction and Transmittal Letter for Articles of Incorporation, 3 Articles of Incorporation, Waiver of Notice of Organizational Meeting, Bylaws, Minutes of First Meetings, Minutes of Second Quarterly Meeting

S Corporation Election, 1244 Stock Resolution, Stock Transfer Ledger, Amendments to Articles, Plan of Merger, Articles of Merger

Pre-Partnership Employment Agreement, Partnership Agreement, Designation of Managing Partner, Amendment to Partnership Statement, Dissolution of Partnership Agreement, Joint Venture Agreement, Instructions for Limited Partnership, Certificate of Limited Partnership, Articles of Limited Partnership, Supplemental Affidavits of Capital Contributions

Instructions for a Limited Liability Company, Transmittal Letter, Articles of Organization, Affidavit of Membership and Contributions, Certificate of Conversion, Instructions for Amending Articles of Organization, Certificate of Amendment, Supplemental Affidavit of Capital Contributions, Instructions and Articles of Dissolution

Statement of Registration of Limited Liability Partnership, Instructions for Application for Sales and Use Tax Registration, Sales and Use Tax Return, Application for Employer ID Number, Report to Determine Employment Status, Application for Registration of Fictitious Name, Notice of Fictitious Name

## About the Book

*Florida Legal Secretary* includes two volumes and a CD-ROM. The sturdy linen binders contain over 1,100 letter-sized pages of step-by-step procedures, and the CD-ROM has over 900 forms in Word and Adobe Acrobat formats.

Updates cost \$89. The updated book and CD-ROM together cost \$129, and may be reviewed for 30 days without obligation.

## About the Author

Kathleen J. Hill, PLS, CLA is a Paralegal for the General Counsel, State of Florida Department of Management Services. Previously she was the President of Paralegal & Attorney Service Bureau, and owned and managed Capitol Services in Tallahassee.

Kathi is past president of Florida Legal Assistants and has served as an officer, board member, and committee chair for both FLA and the National Association of Legal Assistants. She is a past president of Tallahassee Legal Secretaries Association and a past member of the advisory board for Professional Legal Assistants.



## Real Estate Forms

Contract for Sale and Purchase, 3 Options to Purchase, Deposit Receipt and Offer with Acceptance, Short Form Executory Contract, Right of First Refusal, Additional Provisions

Summary of Title Examination, Title Opinion Letter, Quit Claim Deed, Release of Judgment, Estoppel Letter, 4 Deeds, Bills of Sale, 3 Promissory Notes, 8 Mortgages, Riders, Accelerate Payment Note

Data Checklist, Closing Checklist, Estoppel Letter, 6 Affidavits, 4 Partial Releases of Mortgage, Satisfaction of Mortgage, Complaint to Foreclose a Mortgage, Notice of Lis Pendens, Final Judgment of Foreclosure, Motion for Summary Final Judgment

4 Residential Leases, Complaint for Eviction and Damages, Action for Back Rent and Damages, Eviction Summons, Writ of Possession

This instrument prepared by:  
[Preparer's Name and Address]

CONTRACT FOR DEED

THIS INDENTURE, entered into this \_\_\_\_\_ day of \_\_\_\_\_, by and between \_\_\_\_\_ and \_\_\_\_\_ his wife, of \_\_\_\_\_ hereinafter called the Seller, and \_\_\_\_\_ of \_\_\_\_\_ hereinafter called the Purchaser,

WITNESSETH

That the Seller agrees to sell to the Purchaser, and the Purchaser agrees to buy from the Seller, the following described real estate, situate, lying and being in Leon County, Florida, to-wit:

[Property Description]

For the price of \_\_\_\_\_ Dollars (\$ \_\_\_\_\_) of which purchase money the Purchaser has paid \_\_\_\_\_ Dollars (\$ \_\_\_\_\_), the receipt whereof is hereby acknowledged, and has agreed to pay the balance of \_\_\_\_\_ Dollars (\$ \_\_\_\_\_) at the rate of not less than \$ \_\_\_\_\_ monthly, principal and interest inclusive, with interest from date at \_\_\_\_\_ percent (\_\_\_\_\_) per annum, adjusted monthly for a period of \_\_\_\_\_ months, with no prepayment penalties, beginning the \_\_\_\_\_ day of \_\_\_\_\_, and payments to be made at \_\_\_\_\_

The said Purchaser by the acceptance hereof covenants for himself, his heirs and assigns that the above described real estate shall be subject to all restrictions and covenants appearing on public record. Purchaser covenants to keep said property in good repair, free from any waste or deterioration, and covered by hazard insurance in an amount sufficient to replace or repair the improvements thereon to their present condition, as well as liability insurance providing standard coverage as well as coverage for tenant claims thereunder.

During the term of this Agreement, Purchaser agrees that no modifications or alterations shall be made to said property without the prior written consent of Seller and any permanent improvements or alterations so made shall become the property of Seller if this agreement terminates in any manner other than conveyance by deed from Seller to Buyer.

During the term of this agreement, Purchaser shall remove and discharge, at his cost and expense, any liens, encumbrances, and charges upon the property for work authorized by Purchaser which arise out of the use or occupancy of the property or by reason of the furnishing of labor, supplies, or materials.

IN THE CIRCUIT COURT OF THE  
\_\_\_\_\_ JUDICIAL CIRCUIT IN  
AND FOR \_\_\_\_\_ COUNTY, FLORIDA

CASE NO. \_\_\_\_\_  
DIVISION: \_\_\_\_\_

IN RE: The Marriage of  
\_\_\_\_\_  
Petitioner/Husband,  
and  
\_\_\_\_\_  
Respondent/Wife.

PETITION FOR DISSOLUTION OF MARRIAGE  
WITH DEPENDENT OR MINOR CHILDREN

I [full legal name] \_\_\_\_\_  
the (check one only) ( ) Husband ( ) Wife, being sworn, certify  
that the following statements are true:

- JURISDICTION/RESIDENCE. ( ) Husband ( ) Wife has (have) lived in Florida for at least 6 months before the filing of this Petition for Dissolution of Marriage.
- The husband [check one only] ( ) is ( ) is not a member of the military service. The wife [check one only] ( ) is ( ) is not a member of the military service.
- MARRIAGE HISTORY  
Date of Marriage: \_\_\_\_\_, 20\_\_\_\_  
Place of Marriage: [city, state, country] \_\_\_\_\_  
Date of Separation: \_\_\_\_\_, 20\_\_\_\_.
- DEPENDENT OR MINOR CHILDREN  
[check all that apply]  
a. \_\_\_\_\_ The wife is pregnant. Baby is due on: [date].  
b. \_\_\_\_\_ The minor (under 18) child(ren) common to both parties are:

§144 FLORIDA LEGAL SECRETARY 42

- Recording purchase money mortgage taken back by seller.
- Intangible tax on purchase money mortgage taken back by seller.
- Abstract charges or title insurance.
- One-half approval fee by a condominium association.
- Broker's commission.
- Confirmed liens where work has been completed.
- Instruments which must be filed to clear title.
- Attorney's fees.

§144.2 Procedure

Proper

- 1 original closing statement for the buyer
- 1 original closing statement for the seller
- 1 copy of each for file

Forms on CD:

- Affidavit as to Debts and Liens
- Affidavit (By Owner on Sale or Financing)
- Affidavit (Continous Marriage)
- Affidavit (Notary)
- Affidavit (Not One and the Same Person)
- Affidavit (Survey Unchanged)
- Surveyor's Affidavit

See blue pages for instructions on using CD.

§144.3 Items to be Obtained by Seller at Closing

- Cashier's or certified check per closing and pre-closing statements.
- Now, purchase money mortgage, chatted mortgage, security assignments of loans and notes and other related papers, of seller is taking back a mortgage as part of the purchase price.
- Broker's receipt for commission.
- Pre-closing statement signed by the buyer.
- Receipt signed by the buyer for seller's damages for each day's delay, and seller should be required to receive adequate funds to ensure compliance with the terms of the letter.
- Letter signed by the buyer regarding readjustment of tax proration when the tax bill is received.
- Assumption agreement signed by the buyer if the buyer is assuming the seller's mortgage.

§144.4 Items to be Obtained by Buyer at Closing

- Deed.
- Affidavit of title (or title insurance).
- Bill of sale, if applicable.
- Owner's Affidavit.
- Escrow and statements (notes of rental property).
- Copy of existing note, mortgage and accurate assignment of loans and notes, statement from mortgagee or balance due on mortgage, if assuming current mortgage.

4-40.7 DISSOLUTION OF MARRIAGE §414

CASE NO. \_\_\_\_\_  
FLORIDA BAR NO. \_\_\_\_\_

IN RE: The Marriage of  
NORMY DOE, Wife,  
and  
JOHN DOE, Husband.

The petition shall allege the jurisdiction of the court, i.e., that one of the parties has been a resident of the State of Florida for six months prior to the filing of this petition. The next allegation is the grounds for the dissolution, i.e., "The marriage is irretrievably broken." A copy of the petition and summons must be served on the other party (see §410, infra).

§411 Special Allegations

Special items that may be alleged in a dissolution petition include:

- Child custody.
- Temporary or permanent child support.
- Temporary or permanent alimony or other relief.
- Special equity in property.
- Property division.
- Division of liabilities.
- Miscellaneous other items such as return of maiden name, ability of one party to leave the county, state, or country with or without any minor children.
- Visitation.

To gather the information necessary, the attorney must hold an initial interview with the client and gather all the necessary information. This information should be taken on a special "dissolution of marriage interview form" which covers all pertinent information such as the date and place of marriage, the residence of petitioner and respondent, number and ages of children, property owned by either or both parties, and liabilities (see §411, supra).

§412 Preparing the Petition

All court documents, including the Petition for Dissolution of Marriage (or complaint) must be typed double-spaced on 8 1/2" x 11" paper.

The petition sets forth who is the petitioner and who is the respondent. Paragraph 1 states the cause of action. Paragraph 2 asserts the court's jurisdiction over the matter. Paragraph 3 asserts the marital status of the respondent (see §410, supra). Paragraph 4 states the details of the marriage. Paragraphs 5-8 assert those

allegations required under the U.C.C.A. Paragraphs 10-12 assert special allegations child support, property division. Paragraph 13 alleges that the marriage is "irretrievably broken," or the grounds for the petition.

The sample petitions show a verification of the petition by petitioner. Where this is not specifically required in Florida, many attorneys ask their clients to sign and verify the petition as a matter of form.

Forms on CD:

- Petition by Parties for Simplified Dissolution of Marriage
- Petition for Dissolution of Marriage with Dependent or Minor Child(ren)
- Petition for Dissolution of Marriage with Property But No Dependent or Minor Child(ren)
- Petition for Dissolution of Marriage with No Dependent or Minor Child(ren) or Property

See blue pages for instructions on using CD.

§413 Civil Cover Sheet (FRCP v P 1.100)(c)(2)

A civil cover sheet must be completed and filed with the clerk at the time an initial petition is filed by the party initiating the action. If the cover sheet is not filed, the clerk will accept the petition for filing, but all proceedings in the action will be stayed until a properly executed cover sheet is filed.

Forms on CD:

- Civil Cover Sheet

See blue pages for instructions on using CD.

§414 Procedure

Prepare Petition

- 1 original to file with court
- 1 copy to Sheriff for service on respondent
- 1 copy for office file
- 1 copy for client

Prepare Civil Cover Sheet

- 1 original for court
- Summons (see §410, supra)
- 1 copy for return of service (if required)
- 1 copy for file

File original petition with the clerk paying all fees. Have the summons issued (signed and sealed by the clerk).

## Dissolution of Marriage Forms

Dissolution Information, Child Support Guidelines Worksheet, Motions for Temporary Support, Petition for Temporary Custody, Petitions for Dissolution of Marriage, Family Law Financial Affidavits

Motion for Temporary Injunction, Motion for Eviction, Summons, Notice of Commencement of Action, Answers to Petition, Motion for Default

Marital Settlement Agreements, Subpoenas, Request to Produce, Request for Admission, Motion for Appointment of Guardian Ad Litem, Motion for Referral to General Master

Questions to be Asked at Dissolution Hearings, Final Judgments, Final Disposition Form, Supplemental Petitions, Supplemental Final Judgments, Motion for Contempt, Petition for Separate Maintenance, Affidavit and Motion for Waiver of Fees, Petition for Injunction for Protection Against Domestic Violence

## Comments From Your Colleagues

### Paralegals

"I am currently enrolled in a paralegal certification program and have found that (it) has been on-line in every topic." — D.H., Boca Raton

"..like a Bible to me!" — C.A., West Palm Beach

### Attorneys

"I'm an attorney, working without a full-time secretary, and I find I use this book a great deal." — S.F., Jacksonville

"Simple, straight-forward, easy to use." — W.K., St. Petersburg

### Legal Secretaries

"I'm glad that someone finally realized the need for a work such as this." — S.R., Altamonte Springs

"(It) has been by my side ever since I started as a legal secretary nearly four years ago." — J.M., Winter Park

"This is the only book I have used that tells all — why, how and where — and shows the necessary forms." — N.C.

"I request that each new secretary in our office review the volumes." — J.F., Naples

"We all use (it), and I use it on an almost daily basis." — B.R., Orlando

# Abbreviated Contents

## 1. Real Estate

Classifications of Property, Source of Title, Locating the Property, Official or Public Records, Conveyance of Real Property Rights of Owners: Estates, Concurrent Ownership, Limitations and Restrictions, Private Property Rights Protection Act

The Transaction: Option and Contract for Sale, Title Search/Examination or Title Insurance, Clearing the Defects, Prior to Closing, Typing Real Property Descriptions, Deed, Mortgage and Promissory Note

Steps for Closing: Preparation by Seller's Attorney, Preparation by Buyer's Attorney, Fees and Expenses at Closing, Closing Statement, Closing Papers

Foreclosure of Mortgages, Agreements for Deed and Statutory Liens: Parties, Venue, Complaint and Notice of Lis Pendens, Service of Process, Order to Show Cause, Entry of Final Judgment, Default, Summary Judgment

Landlord/Tenant: Nonresidential Tenancies, Residential Tenancies, Right of Action for Possession, Defenses to Action for Rent or Possession, Injunctive Orders, Disbursement of Funds in Registry of the Court, Issuance of the Writ of Possession, Award of Possession and Money Judgment

Glossary of Terms

## 2. Business Organizations

Types, Checklist, Financing

Corporations: Formation, Organizational Meeting, Amendment and Restatement, Mergers, Meeting of Shareholders, Meeting of Board of Directors, Role of Legal Secretary, Uniform Business Report (Annual Report), Dissolution, Withdrawal, and Reinstatement

General Partnerships: Revised Uniform Partnership Act, Formation, Pre-Partnership Agreement, Execution, Filing, and Recording of Partnership Registration, Partner's Liability, Conversions and Merger, Dissolution, Joint Venture

Limited Partnerships: Formation, Certificate, Amendment, Restatement, and Cancellation of Certificate, Conducting the Business, Foreign Limited Partnerships, Annual Reports, Conversions and Mergers, Dissolution

The Limited Liability Company: Fees and Costs, Formation, Articles of Organization, Filing Requirements, Amendments or Restatements, Correcting Articles, Merger, Conversion, Dissolution, Withdrawal of Foreign LLC

Registered Limited Liability Partnerships: Formation, Annual Report, Foreign Partnership, Limited Liability Limited Partnership Sole Proprietorships, Fictitious Name Statute, Glossary

## 3. Civil Litigation

Role of the Legal Secretary, Jurisdiction and Venue, Parties, Limitation of Actions, Times for Filing, Preparation of Documents for Filing: Court Requirements, Indigence

The Complaint: County Court, Form of Complaint, Civil Cover Sheet, Pleading Special Matters, Amendment to Complaint, Amended and Supplemental Pleadings, Procedure Checklist, Venue, Choice of Forum, Filing Documents

Process: Personal Service, by Publication, by Mail, Service of Pleadings and Papers, Service of Orders, Circuit Directory, Directory of Clerks and Sheriffs

Responsive Pleadings: Answer, Counterclaim, Crossclaim, Third Party Practice, Defenses and Motions, Default

Discovery: Scope, Experts, Claims of Privilege, Protective Orders, Depositions, Interrogatories, Production of Documents, Request for Admissions, Examination of Persons, Motion Compelling Discovery, Demand for Jury Trial, Other Pretrial Actions

Before Trial: Summary Judgment, Pretrial Procedure, Continuance of Proceedings, Proposals for Settlement, Mediation, Expedited Trials

Trial: Setting the Case, Trial by Jury, Working with the Attorney, Jury Instructions, Verdicts, Final Judgment, Final Disposition Form

Post-trial: Motions for New Trial, Relief From Judgment, Executions and Final Process, Enforcement, Deposits, Injunctions, Rules Time Chart, Sheriff's Fees and Costs

## 4. Dissolution of Marriage

Role of Legal Secretary, Jurisdiction, Venue and Choice of Forum, Grounds, Simplified Dissolution, Filing Requirements, Computing Time for Filing

Petition: Special Allegations, Preparing the Petition, Civil Cover Sheet, Procedure, Mandatory Disclosure, Child Custody Declaration, Injunctions and Eviction, Notice of Social Security Number

Service of Process: Personal Service, Constructive Service, by Mail, Pleadings and Papers

Responsive Pleadings: Answer, Waiver, Counterclaim, Default Before the Final Hearing: Marriage Settlement Agreements, Depositions, Interrogatories, Production of Documents, Other Pretrial Actions, Appointment of Guardian ad Litem, Pretrial Procedure, Referral to Master, Mediation of Contested Issues

Final Hearing, Post-judgment, Miscellaneous Proceedings, Uniform Interstate Family Support Act

## 5. Estate Planning & Administration

Durable Power of Attorney, Health Care Advance Directives, Health Care Surrogate, Living Will, Absence of Directives

Wills and Codicils: Requirements, Writing the Will, Procedure, Revocation

Trusts: Testamentary, Irrevocable, Revocable, Reverter, Legal Secretary's Role, Procedure

Estate Administration: Production and Proof of Wills, Filing Evidence of Death, Disposition of Personal Property w/o Administration, Adversary Proceedings, Notice and Filing, Miscellaneous Estate Procedures

Elective Share: Property Entering into Elective Estate, Source from Which Elective Share Payable, Abatement, Liability of Direct Recipients and Beneficiaries, Valuation of Property, Effect of Election, Protection of Payors

Family Administration: Requirements, Petition, Notice to Creditors, Procedure, Distribution, Role of the Legal Secretary

Summary Administration: Requirements, Petition, Procedure, Distribution, Role of the Legal Secretary

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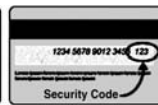
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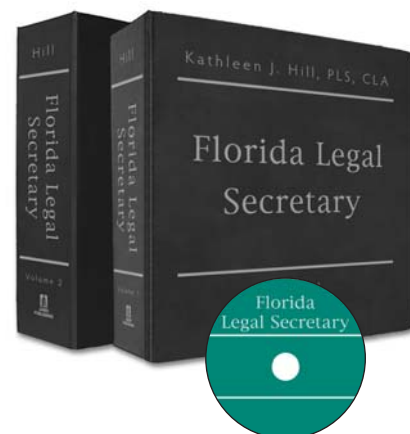
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