

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION TO PROBATE WILL
[R.C. 2107.11, 2107.18, and 2107.19]

Applicant states that decedent died on _____

Decedent's domicile was _____

| | | |
|---|--------|----------------|
| | | Street Address |
| _____ | | _____ |
| City or Village, or Township if unincorporated area | County | |
| _____ | _____ | |
| Post Office | State | Zip Code |
| _____ | _____ | _____ |

A document purporting to be decedent's last will is attached and offered for probate, and applicant waives notice of probate of this will.

Decedent's surviving spouse, children, next of kin, and legatees and devisees, known to applicant, are listed on the attached Form 1.0.

Attorney for Applicant

Applicant

Typed or Printed Name

Typed or Printed Name

Address

Address

Phone Number (include area code)

Phone Number (include area code)

Attorney Registration No.

WAIVER OF NOTICE OF PROBATE OF WILL

The undersigned, being persons entitled to notice of the probate of this will, waive such notice. After a certificate is filed evidencing these waivers and any notices given, any action to contest the validity of this will must be filed no more than three months after the filing of the certificate for estates of decedents who die on or after January 1, 2002, and no more than four months after the filing of the certificate for estates of decedents who die before January 1, 2002.

CASE NO. _____

ENTRY ADMITTING WILL TO PROBATE

The Court finds that the purported will of decedent, either on its face or from testimony of the witnesses, complies with applicable law. It is therefore admitted to probate and ordered recorded. The Court further orders that notice of the probate be given to all parties entitled to notice.

Date

Probate Judge

CERTIFICATE OF WAIVER OF NOTICE

The undersigned states that all persons entitled to notice:

[Check applicable boxes]

- Have waived notice of the application for probate of this will or of a contest as to jurisdiction.
- Have waived notice of this will's admission to probate. The waivers are filed herein.
- Have not been notified because their names or places of residence are unknown and cannot with reasonable diligence be ascertained.

- _____
 Fiduciary
 Applicant for the admission of this will to probate
 Applicant for a release from administration
 Other interested person
 Attorney for any of the above

Attorney Registration No. _____

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

WAIVER OF NOTICE OF PROBATE OF WILL
[R.C. 2107.19(A)(2)]

The undersigned, being persons entitled to notice of the probate of this will, waive such notice. After a certificate is filed evidencing these waivers and any notices given, any action to contest the validity of this will must be filed no more than three months after the filing of the certificate for estates of decedents who die on or after January 1, 2002, and no more than four months after the filing of the certificate for estates of decedents who die before January 1, 2002.

| | |
|-------|-------|
| _____ | _____ |
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| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____
DECEASED _____,

CASE NO. _____

CERTIFICATE OF SERVICE OF NOTICE OF PROBATE OF WILL

[R.C. 2107.19(A)(3)]

The undersigned states that all persons entitled to notice:

[Check all applicable boxes]

- Have waived notice of the admission of this will to probate. The waivers are filed herein.
- Have received notice of the admission of this will to probate.
- Have been notified of the hearing on the probate of this will or a contest as to jurisdiction.
- Evidence of notification is filed herein.
- Have not been notified because their names or places of residence are unknown and cannot with reasonable diligence be ascertained.

-
- Fiduciary
 - Applicant for the admission of this will to probate
 - Applicant for a release from administration
 - Other interested person
 - Attorney for any of the above

Attorney Registration No. _____

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

NOTICE OF PROBATE OF WILL
[R.C. 2107.19(A)]

To: _____

You are hereby notified that the decedent died on _____, _____, that the decedent's will was admitted to probate by this Court located at _____ Ohio, on _____.

This notice is given to all persons who would be entitled to inherit from the decedent had the decedent died intestate and to all legatees and devisees named in this will who do not waive notice. You are receiving this notice as: [check all of the following that apply]

- The Surviving Spouse.
- A person who would be entitled to inherit from the decedent had the decedent died intestate.
- A legatee or devisee named in the will.

After a certificate is filed evidencing any notices given, any action to contest the validity of this will must be filed no more than three months after the filing of the certificate for estates of decedents who die on or after January 1, 2002, and no more than four months after the filing of the certificate for estates of decedents who die before January 1, 2002.

Date

Typed or Printed Name

Address

Phone Number (include area code)

- Fiduciary
- Applicant for the admission of this will to probate
- Applicant for a release from administration
- Other interested person
- Attorney for any of the above

Attorney Registration No. _____

PROBATE COURT OF _____ COUNTY, OHIO

_____, JUDGE

ESTATE OF _____, DECEASED

CASE NO. _____

APPOINTMENT OF APPRAISER

[R.C. 2115.02 & R.C. 2115.06]

- The fiduciary / applicant appoints _____ to appraise those assets of decedent's estate which do not have readily ascertainable value, and asks the Court to approve the appointment. Subject to Court approval on the amount of such compensation, the fiduciary agrees to pay the appraiser reasonable compensation for the services as part of the expenses of administering the estate.
- The fiduciary / applicant will use the valuation of the real property by the County Auditor.

CERTIFICATION

The fiduciary / applicant hereby certifies that the appraiser appointed above is qualified in accordance with the Local Rules of Court

Date

Fiduciary / Applicant

ENTRY APPROVING APPRAISER / ENTRY SETTING HEARING

- The application is hereby approved.
- The Court sets _____ at _____ o'clock ____ M. as the date and time for hearing the above appointment of appraiser.

Date

Probate Judge

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

FIDUCIARY'S BOND

[For Executors and all Administrators]

Amount of bond \$ _____

The undersigned principal, and sureties if any, are obligated to the State of Ohio in the above amount, for payment of which we bind ourselves and our successors, heirs, executors, and administrators, jointly and severally.

The principal has accepted in writing the duties of fiduciary in decedent's estate, including those imposed by law and such additional duties as may be required by the Court.

This obligation is void if the principal performs such duties as required.

This obligation remains in force if the principal fails to perform such duties, or performs them tardily, negligently, or improperly, or if the principal misuses or misappropriates estate assets or improperly converts them to his own use or the use of another.

[Check if personal sureties are involved.] The sureties certify that each of them owns real estate in this county, with a reasonable net value as stated below.

Date

Principal

Surety

Surety

by _____
Attorney in Fact

by _____
Attorney in Fact

Typed or Printed Name

Typed or Printed Name

Address

Address

Net value of real estate owned in this county

Net value of real estate owned in this county

\$ _____

\$ _____

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION FOR AUTHORITY TO ADMINISTER ESTATE
[R.C. 2109.02 and 2109.07]

[For Executors and all Administrators; attach supplemental application for ancillary administration, if applicable]

Applicant states that decedent died on _____

Decedent's domicile was _____
Street Address

City or Village, or Township if unincorporated area _____ County _____

Post Office _____ State _____ Zip Code _____

Applicant asks to be appointed _____ of decedent's estate. [Check whichever of the following are applicable] - [] To applicant's knowledge, decedent did not leave a Will - [] Decedent's Will has been admitted to probate in this Court - [] A supplemental application for ancillary administration is attached.

Attached is a list of the surviving spouse, children, next of kin, and legatees and devisees, known to applicant, which list includes those persons entitled to administer the estate.

The estimated value of the estate is:

Table with 2 columns: Description and Amount. Rows include Personal property, Annual real property rentals, Subtotal, Real Property, Total estimated estate, Applicant owes the estate, and The estate owes applicant.

[Check one of the following four paragraphs]

- [] Applicant says that decedent's Will requests that no bond be required, and therefore asks the Court to dispense with bond.
[] Applicant is a trust company duly qualified in Ohio, and bond is dispensed with by law.

CASE NO. _____

Applicant is decedent's surviving spouse and is entitled to the entire net proceeds of the estate, or applicant is the next of kin entitled to the entire net proceeds of the estate and there is no will. Bond is dispensed with by law.

Applicant offers the attached bond in the amount of \$ _____.

Applicant accepts the duties of fiduciary in the estate imposed by law, and such additional duties as may be required by the Court. Applicant acknowledges being subject to removal as fiduciary for failure to perform such duties as required, and also acknowledges being subject to criminal penalties for improper conversion of any property held as fiduciary.

Attorney for Applicant

Applicant

Typed or Printed Name

Typed or Printed Name

Address

Address

Phone Number (include area code)

Phone Number (include area code)

Attorney Registration No.

WAIVER OF RIGHT TO ADMINISTER
[R.C. 2113.06]

The undersigned, being persons entitled to administer decedent's estate, and whose priority of right to do so is equal or superior to that of applicant, hereby waive appointment to administer the estate.

ENTRY SETTING HEARING AND ORDERING NOTICE

The Court sets _____, at _____ o'clock _____ M. as the date and time for hearing the application for authority to administer decedent's estate. The Court orders notice to take or renounce administration to be given those persons entitled to administer decedent's estate, whose priority of right to do so is equal or superior to that of applicant, and who have not waived appointment to administer the estate.

Date

Probate Judge

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

ENTRY APPOINTING FIDUCIARY; LETTERS OF AUTHORITY

[For Executors and all Administrators]

Name and Title of Fiduciary _____

On hearing in open Court the application of the above fiduciary for authority to administer decedent's estate, the Court finds that;

Decedent died [check one of the following] testate - intestate - on _____, domiciled in _____.

[Check one of the following] Bond is dispensed with by the Will - Bond is dispensed with by law - Applicant has executed and filed an appropriate bond, which is approved by the Court; and

Applicant is a suitable and competent person to execute the trust.

The Court therefore appoints applicant as such fiduciary, with the power conferred by law to fully administer decedent's estate. This entry of appointment constitutes the fiduciary's letters of authority.

_____ Date

_____ PROBATE JUDGE

CERTIFICATE OF APPOINTMENT AND INCUMBENCY

The above document is a true copy of the original kept by me as custodian of the records of this Court. It constitutes the appointment and letters of authority of the named fiduciary, who is qualified and acting in such capacity.

_____ Probate Judge/Clerk

by

_____ [Seal]

_____ Date

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

INVENTORY AND APPRAISAL

[R.C. 2115.02 and 2115.09]

To the knowledge of the fiduciary the attached schedule of assets in decedent's estate is complete. The fiduciary determined the value of those assets whose values were readily ascertainable and which were not appraised by the appraiser, and that such values are correct.

The estate is recapitulated as follows:

| | |
|-----------------------------------|----------|
| Tangible personal property..... | \$ _____ |
| Intangible personal property..... | \$ _____ |
| Real property..... | \$ _____ |
| Total..... | \$ _____ |

First automobile transferred to surviving spouse under R.C. 2106.18 value \$ _____
 Second automobile transferred to surviving spouse under R.C. 2106.18 value \$ _____

Total value [not to exceed \$40,000.00]..... \$ _____

Insofar as it can be ascertained, an Ohio Estate Tax Return will will not be filed.

The fiduciary is also the surviving spouse of the decedent and waives notice of the taking of the inventory.

Attorney

Fiduciary

Attorney Registration No. _____

APPRAISER'S CERTIFICATE

The undersigned appraiser agrees to act as appraiser of decedent's estate and to appraise the property exhibited truly, honestly, impartially, and to the best of the appraiser's knowledge and ability. The appraiser further says that those assets whose values were not readily ascertainable are indicated on the attached schedule by a check in the "Appraised" column opposite each such item, and that such values are correct.

Appraiser

CASE NO. _____

WAIVER OF NOTICE OF TAKING OF INVENTORY
[R.C. 2115.04]

The undersigned surviving spouse hereby waives notice of the time and place of taking the inventory of decedent's estate.

Surviving Spouse

WAIVER OF NOTICE OF HEARING ON INVENTORY
[Use when notice is required by the Court or deemed necessary by the fiduciary]

The undersigned, who are interested in the estate, waive notice of the hearing on the inventory.

ENTRY SETTING HEARING

The Court sets _____ at _____ o'clock _____ M., as the date and time for hearing the inventory of decedent's estate.

Date

Probate Judge

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

NOTICE OF HEARING ON INVENTORY

[R.C. 2115.16]

To:

You are hereby notified that the inventory of decedent's assets has been filed, and the hearing on the inventory will be held on _____ at _____ o'clock _____. M.

The Court is located at _____

Exceptions to the inventory must be filed in writing at least five days prior to the date set for the hearing.

Fiduciary/Attorney for Fiduciary

Attorney Registration No. _____

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF: _____

CASE NO. _____

CITATION TO SURVIVING SPOUSE TO EXERCISE ELECTIVE RIGHTS
[R.C. 2106.01 and 2106.02]

To: _____
Name of Surviving Spouse

Address

City, State, Zip Code

You are hereby cited to elect to exercise your rights as surviving spouse. A summary of these rights is attached and incorporated herein. These rights include the right to elect against the will. Most of the rights must be exercised within five months from the date of the initial appointment of the administrator or executor. If you do not timely elect to exercise any specific right, it will be conclusively presumed you have elected not to exercise that right and the right will be forfeited. If you have questions concerning your rights, you should consult an attorney of your choice.

The date of appointment of the administrator or executor is: _____

The address of the probate court is: _____

The names and addresses of the executor or administrator and his or her attorney are:

Attorney for Applicant

Name

Attorney Registration No.

Title

Address

Address

Phone Number (include area code)

Phone Number (include area code)

Probate Judge

Date: _____

By: _____
Deputy Clerk

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

ELECTION OF SURVIVING SPOUSE TO TAKE UNDER WILL
[R.C. 2106.05]

I, decedent's surviving spouse, elect to take under decedent's Will.

Date

Surviving Spouse

Approved By:

Attorney for Surviving Spouse

Typed or Printed Name

Address

Phone Number (include area code)

Attorney Registration No.

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

ELECTION OF SURVIVING SPOUSE TO TAKE AGAINST WILL
[R.C. 2106.01 and 2106.06]

I, decedent's surviving spouse, elect to take against decedent's Will.

Decedent's Will, my rights under the Will, and my rights by electing to take against the Will have been explained to me.

_____ Date
_____ Surviving Spouse

The above election to take against decedent's Will was made by the surviving spouse in person, before me. Before accepting the election, I explained to the surviving spouse the decedent's Will, the rights under the Will, and the rights by electing to take against the Will.

_____ Probate Judge/Magistrate

Approved By:

Attorney for Surviving Spouse

Typed or Printed Name

Address

Phone Number (include area code)

Attorney Registration No.

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF: _____

CASE NO. _____

**CERTIFICATE OF SERVICE AND NOTICE OF CITATION TO
SURVIVING SPOUSE TO EXERCISE ELECTIVE RIGHTS**
[R.C. 2106.02]

This is to certify that a Citation to Surviving Spouse to Exercise Elective Rights and a Summary of General Rights of Surviving Spouse were mailed to the surviving spouse by certified mail, and a copy of this Certificate mailed to the administrator, executor, or the attorney for the administrator or executor, by ordinary mail, on this _____ day of _____.

Probate Judge

By: _____
Deputy Clerk

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF: _____

CASE NO. _____

**RETURN FOR CERTIFICATE OF SERVICE OF CITATION TO
SURVIVING SPOUSE TO EXERCISE ELECTIVE RIGHTS**
[R.C. 2106.02]

ATTACH
RETURN
RECEIPT
HERE

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

**WAIVER OF SERVICE TO SURVIVING SPOUSE
OF THE CITATION TO ELECT**
[R.C. 2106.01(A)]

The undersigned, surviving spouse of the above named decedent, being eighteen years of age or older and not under disability, waives the service of the citation required by section 2106.01(A) of the Revised Code.

I acknowledge I have received Standard Probate Form 8.3, Summary of General Rights of Surviving Spouse.

I understand that most of my rights must be exercised within five months from the date of the initial appointment of the administrator or executor. If I do not timely elect to exercise any specific right, it will be conclusively presumed I have elected not to exercise that right and the right will be forfeited.

Date

Signature of Surviving Spouse

Typed or printed name of surviving spouse

Attorney for Fiduciary

Typed or Printed Name

Address

City, State, Zip

Telephone Number (including area code)

Attorney Registration No.

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION TO SELL PERSONAL PROPERTY

[R.C. 2113.40, 2113.41, 2113.42, and 2113.43]

The fiduciary asks the Court to authorize the sale of the personal property of the decedent listed on the within schedule, at a public or private sale, for a fixed price or for the best price obtainable, and for cash or on terms as the Court may determine.

The fiduciary states that the sale will be in the best interests of the estate, that none of the property listed is subject to a demand for distribution in kind made by the surviving spouse or other beneficiary entitled to such distribution, and that none of the property listed is subject to a wish expressed by the decedent in the Will that it not be sold. Further, none of the property listed is specifically bequeathed; or if some or all of the property is specifically bequeathed, as noted on the schedule, either its sale is necessary to pay debts, or the persons entitled to it consented to the sale.

The fiduciary further states that: **[Check the applicable boxes]**

The sale is before the expiration of the time within which the surviving spouse may elect to take at the appraised value and the surviving spouse consents to such sale or waives notice thereof the surviving spouse does not consent to such sale, the property is not perishable and the surviving spouse is entitled to notice of the sale as provided by law.

The fiduciary further states that: **[Include any special allegations or information]**

The fiduciary further states that for a public sale, notice will be given by advertisement appearing at least three times in a newspaper of general circulation in the county during a period of fifteen days next preceding such sale and/or by advertisement posted not less than fifteen days next preceding such sale in at least five public places in the township or municipal corporation where such sale is to take place.

Fiduciary

CONSENT TO SALE AND WAIVER OF NOTICE

The undersigned, being the decedent's surviving spouse or other interested persons, hereby waive notice and consent to the sale as described herein.

Surviving Spouse

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

ENTRY AUTHORIZING SALE OF PERSONAL PROPERTY

The Court finds that the sale of the personal property of the decedent as set forth in the application is not prohibited by law and will be in the best interests of the estate.

It is hereby ordered: **[check the applicable boxes]**

That the fiduciary is authorized to sell the personal property in accordance with the terms and conditions as set forth in the application.

That the fiduciary is authorized to sell the personal property in accordance with the terms and conditions as set forth in the application, except as follows: _____

[Check if applicable] - The time has not expired within which the surviving spouse may elect to purchase personal property at its appraised value; the surviving spouse has not consented to the sale, and the property is not perishable. It is therefore ordered that the fiduciary serve at least ten days notice of the sale upon the surviving spouse, as provided by law.

Date

Probate Judge

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION TO DISTRIBUTE IN KIND
[R.C. 2113.55]

The fiduciary asks the Court to authorize distribution in kind, according to the within schedule, of personal property in the estate which is not specifically bequeathed and is available for distribution.

[Check one of the following] - Decedent's known debts have been paid or secured to be paid - Sufficient assets are in hand to pay decedent's known debts.

[Check whichever of the following paragraphs are applicable]:

- All interested persons whose interests may be affected by the distribution have consented to the distribution as proposed in the within schedule.
- All interested persons whose interests may be affected by the distribution have not consented to the distribution as proposed in the within schedule. The fiduciary will give notice as required by law to all interested persons who have not consented and who are listed on the notice of hearing accompanying this application.
- The distribution is to satisfy part or all of the allowance for support due decedent's [check applicable boxes] - surviving spouse - minor children.
- The distribution is with the consent of the surviving spouse, and is to satisfy part or all of the specific monetary share due the surviving spouse under the Statute of Descent and Distribution [if this paragraph is checked, the following must be completed and the surviving spouse must sign the consent form]:

Specific monetary share due surviving spouse \$ _____

Less: Value of property to be distributed hereunder to surviving spouse \$ _____

Probate assets previously received by surviving spouse in excess of the allowance for support \$ _____

Balance of specific monetary share remaining \$ _____

Fiduciary

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

CONSENT TO POWER TO SELL REAL ESTATE

The undersigned are the surviving spouse and legatees, devisees or heirs of decedent. Each declares that he is an adult.

The undersigned empower the fiduciary in the estate, at any time, to sell at public or private sale, or to grant options to buy, or to exchange or re-exchange real estate belonging to the estate, and to execute and deliver the necessary deeds or other conveyances, consistent with law and this power of sale.

Any such sale, option, exchange or re-exchange shall be on terms consistent with law and at a price of not less than eighty per cent of the appraised value of the parcel, as shown on the inventory and appraisal filed in this Court.

[Check one of the following]

- The power of sale consented to herein is general, and extends to all real estate in the estate.
- The power of sale consented to herein is limited, and applies only to the parcels of real estate particularly described below [describe on back].

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(Reverse of Form 11.0)

The particular parcels of real estate in decedent's estate and to which this power of sale is limited are described as follows **[use extra sheets if necessary]**:

PROBATE COURT OF _____ COUNTY, OHIO
_____. JUDGE

ESTATE OF _____ DECEASED

CASE NO. _____

APPLICATION FOR CERTIFICATE OF TRANSFER
[R.C. 2113.61]

Applicant states that decedent died on _____

Decedent's domicile at death was _____
Street Address

City or Village, or Township if unincorporated area _____ County _____

Post Office _____ State _____ Zip Code _____

Decedent died owning the real property described in the accompanying Certificate of Transfer No. _____, which also lists those persons to whom the real property passed. Applicant asks the Court to issue a Certificate of Transfer so that new ownership interests may be recorded.

[Check the applicable boxes]

- Decedent died intestate.
- Decedent died testate on _____; will admitted to probate on _____.
- Decedent's known debts have been paid or secured to be paid.
- Sufficient other assets are in hand to pay decedent's known debts.
- Estate is insolvent and the transfer shall apply toward the allowance for support.
- Applicant was appointed by this Court on _____ and is the qualified and acting executor or administrator of decedent's estate.
- Executor or administrator of decedent's estate failed to file this application before being discharged.
- Applicant is the executor or administrator appointed in another state. There is and has been no ancillary administration in Ohio. The real property to be transferred is located in this county.
- The transfer is subject to a written contract for the sale and conveyance of the real property, entered into but uncompleted by decedent before death. A copy of the contract is attached.
- There has been no administration and none is contemplated [R.C. 2113.61(D)].
- The transfer is pursuant to decedent's Will.
- The transfer is pursuant to the statutes of descent and distribution.
- The transfer is pursuant to summary release from administration [R.C. 2113.031(D)(3)].
- The real property to be transferred is subject to a charge in favor of the surviving spouse in the amount of \$ _____ as computed pursuant to R.C. 2106.11 on attached Exhibit A, and as shown on the accompanying Certificate of Transfer, in respect of the unpaid balance of the specific monetary share which is part of the surviving spouse's total intestate share.

FORM 12.0 - APPLICATION FOR CERTIFICATE OF TRANSFER

CASE NO. _____

- Spousal elections have been exercised.
- Disclaimers or assignments have been filed.
- The transfer is of decedent's entire interest in the mansion house to the surviving spouse, who hereby elects to take such interest as part or all of the intestate share and/or allowance for support. **[If this paragraph is checked, the following must be completed, and both the surviving spouse and applicant must sign this form].**

The value of the total intestate share to which decedent's surviving spouse is entitled is \$ _____

The value of the allowance for support to which decedent's surviving spouse is entitled is \$ _____

The value of decedent's entire interest in the mansion house is:

Interest in mansion house \$ _____

Interest in household goods in house \$ _____

Interest in lots or farm land adjacent to house and used in conjunction with it, which are described in Certificate of Transfer and which spouse hereby elects to include \$ _____

Less: Decedent's share of liens on any and all of above \$ _____

Total \$ _____ \$ _____

Surviving Spouse

Applicant

Title or status

ENTRY ISSUING CERTIFICATE OF TRANSFER

The Court finding that the above application contains the information required by statute orders that Certificate of Transfer No. _____ be filed with this Entry and a copy of the Certificate of Transfer be issued for recording.

[Check if applicable] The Court further finds that the transfer is subject to a charge pursuant to R. C. 2106.11.

Date

Probate Judge

CASE NO. _____

The legal description of decedent's interest in the real property subject to this certificate is: [use extra sheets, if necessary].

[Large empty rectangular box for legal description]

Prior Instrument Reference: _____

Parcel No: _____

This instrument was prepared by _____

ISSUANCE

This Certificate of Transfer is issued this _____ day of _____, 20_____

Probate Judge

AUTHENTICATION

I certify that this document is a true copy of the original Certificate of Transfer No. _____ issued on _____ and kept by me as custodian of the official records of this Court.

Date

Probate Judge

By _____
Deputy Clerk

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

FIDUCIARY'S ACCOUNT
 [R.C. 2109.30, 2109.301 and 2109.32]

[Executors and Administrators]

The fiduciary offers the account given below and on the attached itemized statement of receipts and disbursements. The fiduciary states that the account is correct, and asks that it be approved and settled.

[Check one of the following]

- This is a partial account. A statement of the assets remaining in the fiduciary's hands is attached.
- This is a final account. A statement of the assets remaining in the fiduciary's hands for distribution to the beneficiaries is attached.
- This is an account of distribution, and fiduciary asks to be discharged upon its approval and settlement.
- This is a final and distributive account, and the fiduciary asks to be discharged upon its approval and settlement.
- This is a supplemental final account.

[Complete if this is a partial account, or if one or more accounts have previously been filed in the estate] The period of this account is from _____ to _____

[Complete if applicable] Accounts previously filed in the estate, the accounting periods, and the fiduciary and attorney fees paid for each period, are as follows:

| Date Filed | Accounting Period | Fiduciary Fees Paid | Attorney Fees Paid |
|------------|-------------------|---------------------|--------------------|
| | | \$ | \$ |
| | | | |
| | | | |
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Note:
2117.06(K) states: "The distributee may be liable to the estate up to the value of the distribution and may be required to return all or any part of the value of the distribution if a valid claim is subsequently made against the estate within the time permitted under this section."
2109.32(C) states: "The rights of any person with a pecuniary interest in the estate are not barred by approval of an account pursuant to division (A) and (B) of this section. These rights may be barred following a hearing on the account pursuant to section 2109.33 of the Revised Code."

Case No. _____

This account is recapitulated as follows:

RECEIPTS

Personal property not sold \$ _____

Proceeds from sale of personal property _____

Real property not sold _____

Proceeds from sale of real property _____

Income _____

Other receipts _____

Total receipts \$ _____

DISBURSEMENTS

Fiduciary fees this accounting period \$ _____

Attorney fees this accounting period _____

Other administration costs and expenses _____

Debts and claims against estate _____

Ohio and federal estate taxes _____

Personal property distributed in kind _____

Real property transferred _____

Other distributions to beneficiaries _____

Other disbursements _____

Total disbursements \$ _____

BALANCE REMAINING IN FIDUCIARY'S HANDS \$ _____

Attorney _____

Fiduciary _____

Attorney Registration No. _____

Date _____

ENTRY SETTING HEARING

The Court sets _____ at _____ o'clock _____ M., as the date and time for hearing the above account.

Date _____

Probate Judge _____

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

NOTICE OF HEARING ON ACCOUNT

[R.C. 2109.33]

To:

You are hereby notified that a _____ account covering the period from _____ to _____ has been filed, and the hearing will be held on _____ at _____ o'clock ___ M. The Court is located at _____

You are required to examine the account, to inquire into the contents of the account, and into all matters that may come before the Court at the hearing on the account. Any exceptions to the account shall be filed in writing not less than five days prior to the hearing. Absent the filing of written exceptions, the account may be approved without further notice.

Fiduciary/Attorney for Fiduciary

Attorney Registration No. _____

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____

CASE NO. _____

APPLICATION TO EXTEND ADMINISTRATION
[R.C. 2109.301, Sup. R. 78(B) and (C)]

The undersigned fiduciary applies to extend the administration of the estate beyond six months. The fiduciary states it would be detrimental to the estate and its beneficiaries or heirs to file a final and distributive account or certificate of termination within that time for the following reasons (state with specificity):

Attorney

Fiduciary

Attorney Registration No. _____

ENTRY

Upon consideration of the Application, the Court orders:

- An account or certificate of termination shall be due not later than thirteen months after the appointment of the fiduciary.
- A final and distributive account or certificate of termination is due _____.
- The Application is denied.
- Other: _____

A status letter shall be filed with each partial account or waiver of partial account.

Probate Judge _____

PROBATE COURT OF _____ COUNTY, OHIO

TRUST OF
GUARDIANSHIP OF
ESTATE OF _____

CASE NO. _____

ENTRY APPROVING AND SETTLING ACCOUNT
[R.C. 2109.32]

Upon hearing the account filed _____, the Court finds that:

[Check whichever of the following are applicable]

- The _____ partial account has been lawfully administered;
- The estate has been lawfully administered, except for final distribution to the beneficiaries;
- The estate has been fully and lawfully administered, and the assets have been distributed in accordance with the law or the applicable instruments governing distribution;
- The events have occurred after which the Court may approve and settle a final account;
- The events have occurred after which the Court may approve and settle a supplemental final account.

The account is therefore approved and settled.

[Check whichever of the following are applicable]

The fiduciary shall be discharged without further order of the Court twelve months following the approval of the final and distributive account unless discharged by this entry.

- The fiduciary is discharged herewith;
- The surety bond is terminated herewith.

Date

Probate Judge

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

CERTIFICATE OF TERMINATION

[R.C. 2109.30]

I certify I am the executor or administrator and the sole legatee, devisee or heir.

I further certify:

- (1) all debts and claims presented to the estate have been paid in full or settled finally;
- (2) an estate tax return, if required under Chapter 5731 of the Revised Code, has been filed, and any estate tax due under that chapter has been paid;
- (3) all attorney fees have been [check one] waived by counsel of record, paid to counsel of record in the amount of \$ _____;
- (4) all fiduciary fees have been [check one] waived by the fiduciary; paid to the fiduciary in the amount of \$ _____;
- (5) all assets remaining after completion of the activities described above have been distributed to myself as the sole legatee, devisee or heir.

Attorney for Fiduciary

Fiduciary

Attorney Registration No. _____

ENTRY

Based upon the above certification it is ordered that the fiduciary and surety, if any, are discharged.

Probate Judge

MAR 17 2015

Appendix E

PROBATE COURT OF MONROE COUNTY, OHIO

FILED

ESTATE OF _____, DECEASED

CASE NO. _____

ADMINISTRATOR/EXECUTOR FEES (ORC 2113.35)

I. PERSONAL PROPERTY (IN ESTATE)

| | | | | | |
|--------------|---|--------------|---|-------|-------|
| 0 | - | \$100,000.00 | @ | 4.00% | _____ |
| \$100,001.00 | - | \$400,000.00 | @ | 3.00% | _____ |
| \$400,001.00 | - | Up | @ | 2.00% | _____ |

1. TOTAL \$ _____

II. REAL ESTATE (NOT SOLD IN ESTATE)

2. 1% of Value Used in Ohio Estate Tax
\$ _____

III. NON-PROBATE ASSETS (EXCEPT JOINT & SURVIVORSHIP)

3. 1% of Value of Property Includable in
Ohio Estate Tax \$ _____

IV. RECAPITULATION

Item 1 \$ _____
Item 2 \$ _____
Item 3 \$ _____

Total Adm./Exec. Allowable by Statute \$ _____

Fees Paid in Prior Accounts (-) \$ _____

Balance Payable \$ _____

Fees Requested \$ _____

Signature of Admin/Executor

Printed Name of Admin/Executor

PROBATE COURT OF MONROE COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

COMPUTATION OF ATTORNEY FEES

FULL ADMINISTRATION:

First \$25,000 at 5% \$ _____

Next \$175,000 at 4% _____

Over \$200,000 at 3% _____

RELEASE:

First \$5,000 at 4% \$ _____

Over \$5,000 at 3% _____

JOINT & SURVIVORSHIP PROPERTY:

Two percent (2%) of full value,
except at 1% when co-owner is
surviving spouse \$ _____

TOTAL: \$ _____

ACTUAL FEE TAKEN: \$ _____

Attorney for Fiduciary
Regis. No. _____

PROBATE COURT OF _____ COUNTY, OHIO

IN THE MATTER OF _____

Case No. _____ Docket _____ Page _____

APPLICATION TO PAY ATTORNEY FEES

Now comes.....,

herein and represents to the Court that in the course of the administration of said estate, it has been necessary for to employ the services of

attorney; that said attorney has rendered services beneficial to said estate; and that the reasonable value thereof is the sum of \$.....

For: (Set forth actual computation)

WHEREFORE, your applicant prays for authority to pay to said attorney said sum in full compensation for his ordinary services rendered herein.

.....
.....
.....
of the Estate of
.....

The State of Ohio, _____ County, ss.

....., *being first duly sworn,*
says..... *is the*.....
above named and that the facts stated in the foregoing application are true as.....
verily believes.

.....
Sworn to before me and subscribed in my presence this
day of

JUDGMENT ENTRY

Common Pleas Court, Probate Division _____ County, Ohio

In the Matter of
THE ESTATE OF

Order to Pay Attorney Fees

Deceased

This day this cause came on to be heard upon the foregoing application of the fiduciary for authority to pay reasonable compensation to said fiduciary's attorney for his ordinary services performed in behalf of said estate; and being submitted to the Court, upon the evidence, the Court finds that no further notice of this application or the hearing thereon is necessary; that the facts stated in said application are true; and that the prayer thereof should be granted; and

It is, accordingly, ORDERED, ADJUDGED and DECREED that said fiduciary be and _____ hereby is authorized and directed to pay from the funds of said estate to _____, attorney, the sum of \$ _____ in full compensation for ordinary services herein.

Judge

Approved:

Attorney for

No. _____

Doc. _____ Page _____

Court of Common Pleas
Probate Division

County, O.

THE ESTATE OF

In the Matter of

Deceased

Application to Pay Attorney's
Fees and Entry Ordering
Payment

JUDGMENT ENTRY

Dated _____, _____

Recorded

Jour. Vol. _____ Page _____

Barrett Brothers, Publishers, Springfield, Ohio

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

Case No. _____ Docket _____ Page _____

FIDUCIARY'S ACCEPTANCE (EXECUTOR - ADMINISTRATOR)

Revised Code, Sec. 2109.02

I, the undersigned, hereby accept the duties which are required of me by law, and such additional duties as are ordered by the Court having jurisdiction of the subject matter of the trust, as _____

(EXECUTOR - ADMINISTRATOR)

Among those duties are:

- 1. Collecting assets and administering same according to law.
2. Depositing funds which come into his hands in a lawful depository located in this state.
3. Making and filing an inventory and appraisalment of such assets within 90 days after appointment, unless the court extends the time for good cause shown.
4. After inventory is filed, if other assets are discovered, filing a report of newly discovered assets within 30 days of such discovery.
5. Proceeding with diligence to pay debts.
6. Making and filing an account within 6 months after appointment. If the executor or administrator is the sole legatee of heir, or none of the legatees or heirs is under a legal disability, upon consent of such person, a partial accounting may be waived in which case a final account must be filed within 30 days after administration is completed.

I acknowledge that I am subject to removal as such fiduciary if I fail to perform such duties.

I also acknowledge that I am subject to possible penalties for improper conversion of the property which I hold as such fiduciary.

Signed _____ FIDUCIARY

Date: _____

NOTE: Sec. 2109.02. Every fiduciary, before entering upon the execution of a trust, shall receive letters of appointment from a probate court having jurisdiction of the subject matter of the trust.

The duties of a fiduciary shall be those required by law, and such additional duties as the court orders. Letters of appointment shall not issue until a fiduciary has executed a written acceptance of his duties, acknowledging that he is subject to removal for failure to perform his duties, and that he is subject to possible penalties for conversion of property he holds as a fiduciary. The written acceptance may be filed with the application for appointment.

PROBATE COURT OF MONROE COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____ DATE OF DEATH _____

NOTICE TO COURT OF DECEDENT'S MEDICAID STATUS

- The decedent **WAS NOT** over the age of 55 years.
- The decedent **WAS** over the age of 55 years.

- The decedent **WAS NOT** a permanently institutionalized individual.
- The decedent **WAS** a permanently institutionalized individual.

- The decedent **WAS NOT** a Medicaid recipient at any time during his/her life.
- The decedent **WAS** a Medicaid recipient at any time during his/her life.

- Decedent's **PREDECEASED SPOUSE WAS** a Medicaid recipient and **WAS** subject to the Medicaid Estate Recovery Program at the time of said spouse's death. Decedent's spouse's name was _____.

- Notice that either the decedent or the decedent's predeceased spouse was a Medicaid recipient and subject to the Medicaid Estate Recovery Program was provided to the Administrator of the Ohio Medicaid Estate Recovery Program or to Attorney James Huggins, Special Counsel to the Administrator of the Ohio Estate Recovery Program by certified U. S. Mail, postage prepaid, on the _____ day of _____, 20_____.

CERTIFICATE

The undersigned Fiduciary hereby certifies that the above information is true and correct.

Date

Fiduciary

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

Case No. _____ Docket _____ Page _____

**REPORT OF NEWLY DISCOVERED ASSETS
AND JUDGMENT ENTRY—ORDERS TO ADMINISTER**

Revised Code, Sec. 2113.69

*The undersigned, _____ of the estate of
_____ deceased, respectfully reports that certain newly dis-
covered assets have come into _____ hands since the filing of the original Inventory
in said estate on the _____ day of _____ 19_____. Said assets,
with the estimated value of each, are as follows:*

Description of Assets Estimated Value

*Wherefore the undersigned prays for an order of the Court to administer, ac-
count for, and distribute such assets in like manner as if received prior to the filing
of the original Inventory without being required to make an Inventory or Appraise-
ment of the same unless ordered to do so by the Court, either on its own motion or
upon the application of any interested party.*

Respectfully submitted, this _____ day of _____ 19_____

_____ of the estate of

Deceased

The State of Ohio, _____ County.

_____, being duly sworn, says
that the foregoing report is in all respects true and correct as _____ verily believes.

Sworn to before me and signed in my presence, this

_____ day of _____ 19_____

Judge

Deputy Clerk

JUDGMENT ENTRY

Court of Common Pleas, Probate Division County, Ohio

In the Matter of

THE ESTATE OF

No.

.....19.....

.....
Deceased

ORDERS TO ADMINISTER

This day came.....,of the estate of.....deceased and made and filed.....report of newly discovered assets which have come intohands since the filing of the original Inventory in said estate. And it appearing to the Court that said report is in all respects correct, it is ordered that.....administer, account for, and distribute such assets in like manner as if received prior to the filing of the original Inventory without being required to make an Inventory or Appraisement of the same.

.....
Judge

No.
Doc. Page

Court of Common Pleas
Probate Division
.....County, O.

In the Matter of
THE ESTATE OF

.....
Deceased

Report of Newly Discovered Assets
and Judgment Entry
—Order to Administer

Recorded in Account Record

Jour. Vol. Page

JUDGMENT ENTRY

Dated, 19.....

Recorded

Vol. Page