

INSTRUCTIONS FOR FULL ADMINISTRATION OF AN ESTATE

This checklist is intended as a guideline only and should not be relied upon as a comprehensive list of fiduciary duties in the administration of a decedent’s estate.

The following are necessary at the initial filing:

1. If decedent created a will, the original will.
2. Evidence of death per Local Rule 60.1 (C).
3. Filing fee. **Current Court Costs are posted at: <https://www.probatect.org/about/general-resources>.** Please confirm the amount with the cashier since filing fees may have changed subsequent to the publication of this instruction sheet. **The fee must be paid in cash, money order, MasterCard, Discover, or American Express. No personal checks will be accepted.**

The forms may be obtained from the Issue Desk on the 9th floor of the Probate Court, 230 E. 9th Street, Cincinnati, Ohio or by downloading the forms from the web site.

PROCEDURAL STEPS

STATUTORY TIME LIMIT

<p>1. Surviving Spouse, Next of Kin, Legatees and Devisees (1.0) [R.C. 2105.06]</p> <ul style="list-style-type: none"> - On <i>front</i> of form, list all <i>next of kin</i> (those people who are or would be entitled to inherit <i>if</i> there were no will), on <i>back</i> of form, list all others named in will (if decedent left a will). - Be sure to specify <i>complete</i> addresses of all of those listed. 	<p>On opening any estate</p>
<p>Classification Form for Estates (H.C. 1.01)</p> <ul style="list-style-type: none"> - Complete form. - If there is a surviving spouse and (s)he is not taking everything under the will or there is a surviving spouse and the date of death is on or after 1/1/2002, a citation to elect will be issued to the surviving spouse (A1). - If the (co)beneficiary and the (co)fiduciary are the same person or the same two people, a Certificate of Termination should be used (A2). - If one of the reasons for an extension of time to complete the administration of the estate applies, check that box (for dates of death on or after 1/1/02) - Go to the public terminal computer, select (2) “case index & docket”, type in the last name of decedent, check for “Will Dep” under the name of the decedent, get case # (if there is a will on deposit listed under decedent’s name), go to Issue Desk, request that the will be produced. - After reading and understanding form 1.01 certification language, sign. 	<p>On opening any estate</p>

<p>2. Application to Probate Will (2.0) [R.C. 2107.11, 2107.18, 2107.19]</p> <ul style="list-style-type: none"> - Complete information (Note: If no Will, proceed directly to Step 3) 	<p>On opening estate and presentation of Will</p>
<p>Waiver of Notice of Probate of Will (2.1) [R.C. 2109.19(A)(2)] Notice of Probate of Will (2.2) [R.C. 2107.19(A)(1)]</p> <ul style="list-style-type: none"> - All parties who are listed on the front and back of 1.0 are entitled to be notified of the probate of the will. You must either obtain a waiver from each individual (2.1) or perfect certified mail notice (2.2) on each individual. - If certified mail notice is used, present certified mail return (green card) and a copy of the notice that was sent to each individual to the magistrate assigned to your case. 	<p>With application or before form 2.4 (Within 120 days of appointment) (If date of death is on or after 1/1/2002 then within 2 months of admitting will to probate)</p> <p>If notice is given within 120 days of appointment If date of death is on or after 1/1/2002 notice must be given within 2 weeks of admitting will to probate</p>
<p>Entry Admitting Will to Probate (2.3) [R.C. 2107.18]</p> <ul style="list-style-type: none"> - Fill in the name of the decedent only, the magistrate will sign and date the form. 	<p>Upon presentation of Will</p>
<p>Certification of Service of Notice of Probate of Will (2.4) [R.C. 2107.19(A)(3)]</p> <ul style="list-style-type: none"> - This form is filed after all waivers and/or certified mail notices of probate of will have been obtained. - If date of death is on or after 1/1/2002 within 2 months of admitting will to probate or applicant and attorney will be <u>cited to appear</u> 	<p>Within 120 days of appointment</p> <p>If date of death is on or after 1/1/2002 within 2 months of admitting will to probate</p>
<p>Election of Spouse [R.C. 2106.01]</p> <ul style="list-style-type: none"> - Citation to Elect is sent out by the Court to the Surviving Spouse by certified mail after the inventory is filed. - If date of death is on or after 1/1/2002 Citation to Surviving Spouse to Exercise Elective Rights and Summary of General Rights of Surviving Spouse are sent out by the Court to the Surviving Spouse by certified mail after the fiduciary is appointed. Form 8.6 Waiver of Service to Surviving Spouse of the Citation to Elect <u>must</u> be filed at the time of issuing of the letters of authority to dispense with the serving of the 	<p>Anytime after death of decedent but not later than one month after service of citation to elect</p> <p>If date of death is on or after 1/1/2002 Surviving Spouse must exercise spousal rights within 5 months from date of service or those rights are waived.</p>

<p>citation</p> <ul style="list-style-type: none"> - Election of Surviving Spouse to Take Under Will (8.1) - Election of Surviving Spouse to Take Against Will (8.2) - Surviving Spouse must appear before magistrate when electing to take against the will. 	
<p>Will Contest [R.C. 2107.71, 2107.76] No form</p>	<p>For dates of deaths before 1/1/2002 within four months of filing of Certificate of Service of Notice of Probate of Will Loc R. 59.1(B) For dates of death on or after 1/1/2002 within three months of filing of Certificate of Service of Notice of Probate of Will</p>
<p>3. Application for Authority to Administer Estate (H.C.4.0) [R.C. 2109.02, 2113.07]</p> <ul style="list-style-type: none"> - Complete information. - Applicant must estimate the value of the estate. - If applicant owes the estate or is owed by the estate, the applicant must report this. Any claim that the applicant has against the estate must be filed within three months of appointment. 	<p>After probate of will; if no will, any time after death</p>
<p>Entry Setting Hearing on Application to Administer Estate (HC 4.01)</p> <ul style="list-style-type: none"> - Fill in the name of the decedent only, the magistrate will fill in the hearing date & time and sign & date the form. - Unless nominated in the will, if the applicant is the decedent's surviving spouse or next of kin, the hearing will be set before a magistrate. If the applicant is neither surviving spouse nor next of kin, the hearing will be set before the Judge. 	<p>With the filing of the Application to Administer</p>
<p>Fiduciary's Bond (4.2) [R.C. 2109.94, 2109.07, 2109.09]</p> <ul style="list-style-type: none"> - Applicant must execute and date form. - Bond must be executed by an agent whose power of attorney is on file with the court. - The bond shall be twice the value of the estate (minimum \$20,000). 	<p>Before appointment when not dispensed with by will or law</p>

<p>Waiver of Right to Administer Estate (4.3) [R.C. 2113.07]</p> <ul style="list-style-type: none"> - All next of kin and the surviving spouse (everyone on front of form 1.0) must waive their right to administer estate, if the person applying is not the person nominated in the will. 	<p>Filed with application or before appointment</p>
<p>Notice of Hearing on Appointment of Fiduciary (4.4)</p> <ul style="list-style-type: none"> - If the applicant was not appointed by the will to be executor, those next of kin and surviving spouse who have not waived their right to administer must be sent certified mail notice. 	<p>Prior to appointment</p>
<p>Fiduciary's Acceptance (H.C. 4.8)</p> <ul style="list-style-type: none"> - Complete name of decedent, sign and date. <p>Note: The Court will hold applicant responsible for the duties described on the form.</p>	<p>Prior to appointment</p>
<p>Entry Appointing Fiduciary; Letters of Authority (4.5) [R.C. 2113.05, 2113.06]</p> <ul style="list-style-type: none"> - Complete form in duplicate. - The court clerk will sign and date if approved by Judge or magistrate. 	<p>At the time of filing the Application to Administer</p>
<p>4. Appointment of Appraiser and Entry (H.C. 3.0) [R.C. 2115.06]</p> <ul style="list-style-type: none"> - If there are assets in the estate which values are not readily ascertainable, an appraiser must be appointed by the fiduciary and approved by the Court to appraise those assets. - Auditor value. - Tangible personal property that has an aggregate value of \$5,000 or more must be appraised. 	<p>Prior to Appointment</p>
<p>5. Inventory and Appraisal (6.0) [R.C. 2115.02]</p> <ul style="list-style-type: none"> - Fiduciary must list values of assets in the estate. Get appraiser's values for assets which are not readily ascertainable. - All real estate must be appraised. - Tangible personal property that has an aggregate value of \$5,000 or more must be appraised. 	<p>Within three months after appointment unless Court grants extension for good cause</p>
<p>Schedule of Assets (6.1)</p> <ul style="list-style-type: none"> - Specifically list each asset of the decedent's estate. Description should include bank account numbers, serial numbers, stock certificate numbers, and book, plat & parcel numbers for real estate. 	<p>Filed with 6.0</p>

<p>Waiver of Notice of Hearing on Inventory (6.2) (or on back of Form 6.0) Notice of Hearing on Inventory (6.3) [R.C. 2115.16]</p> <ul style="list-style-type: none"> - All parties who are listed on the front and back of Form 1.0 are entitled to be notified of the hearing on the inventory. You must either obtain a waiver from each individual (6.2) or perfect notice (6.3) on each individual. - Notice may be served by ordinary mail or by personally delivering a copy of the notice to the person entitled to receive it. An “Affidavit of Service” shall be filed. - Notice must be given no less than five (5) days prior to hearing. 	<p>Filed before approval of inventory Served by ordinary mail on all parties ordered by court unless waived</p>
<p>Entry Setting Hearing on Inventory (H.C. 6.4) [R.C. 2115.16]</p> <ul style="list-style-type: none"> - Fill in the name of decedent only, the magistrate will fill in hearing date & time and sign & date form 	<p>Not less than 10 nor more than 30 days after filing inventory, unless continued to later date by Court.</p>
<p>Notice of Surviving Spouse of Taking of Inventory [R.C. 2115.04] Waiver of notice by spouse on back of Form 6.0</p>	<p>At least five days before taking of inventory</p>
<p>Exceptions to Inventory [R.C. 2115.16] No form</p>	<p>May be filed at any time prior to five days before hearing on inventory</p>
<p>Hearing on Exceptions to Inventory [R.C. 2115.16]</p>	<p>As set by Court</p>
<p>Entry Approving Inventory (H.C.6.5) [R.C. 2115.16]</p> <ul style="list-style-type: none"> - Fill in the name of decedent and have attorney sign 	<p>After hearing on inventory or hearing on exceptions to inventory</p>
<p>Certificate of Fee Agreement</p>	<p>Due before or with the filing of the Inventory</p>
<p>Report of Newly Discovered Assets [R.C. 2113.69] No form</p>	<p>Within thirty days of receipt of such assets</p>
<p>6. Collection of Assets [R.C. 2113.25]</p>	<p>Within nine months of appointment of fiduciary</p>

7.	Election of the Surviving Spouse to Purchase Property [R.C. 2106.16] No form	After the filing of the inventory but not later than one month after the approval of the inventory
7A.	Election of Surviving Spouse to Receive Mansion House [R.C. 2106.10] Form H.C. 108.40	At or before final account or prior to Entry Relieving Estate from Administration
8.	Sale of Personal Property [R.C. 2113.40, 2113.41] Forms 9.0, 9.1, 9.2	Any time after appointment when Court is satisfied it would be for best interest of estate
	Report of Sale of Personal Property [R.C. 2113.42]	Within thirty days after sale
	Application for Sale/Transfer of Motor Vehicle & Entry (H.C.9.4) - Complete form and obtain necessary consents.	After appointment of fiduciary
9.	Application for Certificate of Transfer (12.0) [R.C. 2113.61] - Complete form	After approval of Inventory, but before final distribution of estate
	Certificate of Transfer (12.1) [R.C. 2113.61] - List each beneficiary's name, address, and the fractional interest that beneficiary is receiving from decedent's estate. Complete back of form. This form must be prepared in duplicate.	
	Entry Issuing Certificate of Transfer (12.2) [R.C. 2113.61] - Fill in the name of decedent only, the magistrate will approve.	
	Complaint for Sale of Real Estate [R.C. 2127.10] No form	When personal estate found to be insufficient to pay debts or Court determines it to be in best interest of estate Inventory must be filed
	Sale of Real Estate to Pay Legacies [R.C. 2127.03] No form	As soon as necessary (same as preceding) Inventory must be filed

10.	Application to Distribute Personal Property in Kind [R.C. 2113.55] Forms 10.0, 10.1, 10.2	When desired
11.	Determination of Heirship [R.C. 2123.01 et seq.] No form	Before distribution of estate
12.	Claims of Executor or Administrator [R.C. 2117.02] No Form - Set for hearing before the Judge if claim is greater than \$500. - Set for hearing before magistrate if claim is \$500 or less	Within three months after appointment
	Claims of Creditors [R.C. 2117.06] No form	Within 6 months of date of death of decedent
	Contingent Claims [R.C. 2117.37] No form	Within 6 months of date of death of decedent or within two months after cause of action accrues, whichever is later
	Allowance or Rejection of Claim [R.C. 2117.06] No form	Within thirty days after presentation
	Action on Rejected Claim [R.C. 2117.12] No form	Within two months after rejection if debt due, or within two months after debt becomes due
13.	Suits Against Executor or Administrator [R.C. 2117.30] No form	After five months following appointment or later as extended by Court; within two months after rejection of claim is due, or two months after the claim becomes due

<p>14. Application and Entry for Fixing Attorney Fees [R.C. 2113.36]</p> <ul style="list-style-type: none"> - Need copy of hours attached to application - If amount over the guideline, application is set before the Judge. <p>No form</p>	<p>Prior to filing of Final Account</p>
<p>15. Notice of Hearing on Attorney Fees (H.C. 210.07) Waiver and Consent to Attorney Fees (H. C. 210.06)</p> <ul style="list-style-type: none"> - You must obtain a waiver from all parties who are residual beneficiaries (H.C. 210.06) or perfect certified mail notice (H.C. 210.07) on each individual when the attorney fees are above the guideline and set for hearing before the Judge. - If certified mail notice is used, present certified mail return (green card), a copy of the notice that was sent to each individual, and an affidavit stating that certified mail service has been completed to the Cashier for filing. 	
<p>Consent to Attorney Fees (H.C. 210.05)</p> <ul style="list-style-type: none"> - If the attorney fees are within the guidelines, the residual beneficiaries may sign consent forms in lieu of an application and entry. 	
<p>16. Filing of Ohio Estate Tax [R.C. 5731.23]</p> <ul style="list-style-type: none"> - Obtain tax forms at Issue Desk in Probate Court or on the Ohio Department of Taxation web site. - Forms filed in duplicate with original signatures – one copy stays with Probate Court and one copy taken to Auditor’s office where tax is paid (if owed) and then sent to Department of Taxation in Columbus. - If date of death is between 1/1/2001 and 12/31/2001 and gross estate is under \$200,000 a return is not required to be filed. A Form 22 Certificate of Estate Tax Payment and Real Property Disclosure is filed instead with Probate Court only. - If date of death is on or after 1/1/2002 and gross estate is under \$338,333 a return is not required to be filed. A Form 22 Certificate of Estate Tax Payment and Real Property Disclosure is filed instead with Probate Court only. - If date of death is on or after January 1, 2013, a tax return is not required to be filed. 	<p>Filed and paid within nine months of date of death of decedent unless extension granted by tax department.</p>

17. Filing of Federal Estate Tax Form 706	Filed and paid within nine months of date of death of decedent. Filed with IRS.
18. Disposition of Unclaimed Money (H.C. 110.58 & H.C.110.59) [R.C. 2113.64, 2113.65]	Paid to county treasurer if unclaimed for six months
19. Certificate of Termination (13.6) [R.C. 2109.30(B)(1)] <ul style="list-style-type: none"> - May be used if there is either sole heir/sole fiduciary or co-heirs/co-fiduciaries 	Within thirty days after completion of administration of estate If date of death is on or after 1/1/2002 within 6 months of appointment unless extension obtained.
Waiver of Partial Account (13.40)	May be filed in the place of a fiduciary's account.
Affidavit and Entry in Lieu of Partial Account (H.C. 113.01) <ul style="list-style-type: none"> - Utilized in wrongful-death cases 	May be filed annually in the place of a fiduciary's account
20. Fiduciary's Account (13.0) [R.C. 2109.30] <ul style="list-style-type: none"> - Fiduciary must complete an exact accounting of all transactions that have occurred during pending estate administration. - Complete form. - Account will be reviewed by an account clerk. - Bring canceled checks, bank statements, and titles to personal property, closing statements 	First account due 9 months from date of appointment; subsequent accounts due annually thereafter for dates of death before 1/1/2002. For dates of death on or after 1/1/2002 a Final and Distributive Account must be filed within 6 months after the appointment of fiduciary, unless a statutory condition is met or an extension is granted.
Receipts and Disbursements (13.1) <ul style="list-style-type: none"> - Specifically list receipts and disbursements of decedent's estate 	
Assets Remaining in Fiduciary's Hands (13.2) <ul style="list-style-type: none"> - Complete form if filing a partial account. Specifically describe those assets of decedent's estate remaining in fiduciary's hands 	

<p>Certification of Service of Account to Heirs and Beneficiaries (13.90)</p> <ul style="list-style-type: none"> - Required when presenting an account with date of deaths on or after 1/1/2002 - Complete form. - Must be signed by fiduciary. - Does not eliminate filing of waivers or notice of hearing on account for final accounts. 	<p>Only used for estates opened with dates of death on or after 1/1/2002</p>
<p>Notice to Extend Administration (13.10)</p> <ul style="list-style-type: none"> - Complete form. - No need to file if included a Form 1.01. - No court approval needed - File with cashier - Will extend time for filing final account to 13 months from date of appointment. 	<p>Only used for estates opened with dates of death on or after 1/1/2002</p>
<p>Application and Entry to Extend Administration (H.C. 13.81)</p> <ul style="list-style-type: none"> - Complete form. - Must be signed by fiduciary. - Must be approved by assigned magistrate only. - Filed with partial account or waiver of partial account. - When an Application to Extend Administration is presented seeking an extension of time to administer a decedent's estate because the decedent's real estate has not been sold and 13 months have expired since the letters of administration were issued, a copy of a listing contract to sell the property must be attached to the application. The listing contract should be signed by the fiduciary for the estate and the real estate agent. 	<p>Only used for estates opened with dates of death on or after 1/1/2002</p>
<p>Entry Setting Hearing on Account (213.8) [R.C. 2109.32]</p> <ul style="list-style-type: none"> - Fill in the name of the decedent and have attorney sign. The account clerk will fill in the hearing date & time. 	<p>Not earlier than thirty days after filing of account</p>
<p>Waiver of Notice of Hearing on Account (13.7) Notice of Hearing on Account (13.5) (FINAL ACCOUNT) [R.C. 2109.33]</p> <ul style="list-style-type: none"> - All residual beneficiaries are entitled to be notified of the hearing on the account. You must either obtain a waiver from each individual (13.7) or perfect service notice (13.5) on each individual. - Notice may be served by ordinary mail or by personally delivering a copy of the notice to the person entitled to receive it. An "Affidavit of Service" shall be filed. - Waivers of notice are not required on a PARTIAL ACCOUNT. 	<p>Filed before approval of acct.</p> <p>Served at least fifteen days prior to hearing on all parties ordered by Court unless waived.</p>

Exceptions to Account [R.C. 2109.33] No Form	May be filed at any time prior to five days before hearing on account.
Hearing on Exceptions to Account [R.C. 2109.33] No form	As set by Court
Entry Approving and Settling Account (13.3) [R.C. 2109.32] - Complete form - RC2109.32(B)(1) requires fiduciary to provide a copy of the account to each heir or beneficiary for estates opened with dates of death on or after 1/1/2002 - By statute, a copy of the account is not required for a heir or beneficiary whose residence is unknown, or for a beneficiary of a specific bequest or devise who has received distribution for which a receipt is filed or presented to the Court	After hearing on account or hearing on exceptions to account; not before three months from date of death of decedent or before the surviving spouse has made an election or the time for making an election has expired

Information Purposes Only: Effective March 16, 1996, two automobiles can now be transferred to surviving spouse if not a specific bequest and the total value of both automobiles does not exceed \$40,000.00.

No limit on value if only one automobile is transferred.

[Form provided by Clerk of Courts]

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

**SURVIVING SPOUSE, CHILDREN, NEXT OF KIN,
LEGATEES AND DEVISEES**

[R.C. 2105.06, 2106.13 and 2107.19]

[Use with those applications or filings requiring some or all of the
information in this form, for notice or other purposes. Update as required.]

The following are decedent's known surviving spouse, children, and the lineal descendants of deceased children. If none, the following are the decedent's next of kin who are or would be entitled to inherit under the statutes of descent and distribution.

Name	Residence Address	Relationship to Decedent	Birthdate of Minor
		Surviving Spouse	

[Check whichever of the following is applicable]

- The surviving spouse is the natural or adoptive parent of all of the decedent's children.
- The surviving spouse is the natural or adoptive parent of at least one, but not all, of the decedent's children.
- The surviving spouse is not the natural or adoptive parent of any of the decedent's children.
- There are minor children of the decedent who are not the children of the surviving spouse.
- There are minor children of the decedent and no surviving spouse.

The following are the vested beneficiaries named in the decedent's will.

Name	Residence Address	Birthdate of Minor

[Check whichever of the following is applicable]

- This will contains a charitable trust or a bequest or devisee to a charitable trust, subject to R.C. 109.23 and 109.41.
- The will is not subject to R.C. 109.23 and 109.41 relating to charitable trusts.

_____ Date

_____ Applicant (or give other title)

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

CLASSIFICATION FORM FOR ESTATES

[Check one of the following: A., B., C., or D]

- A. This estate requires full administration. The following special instructions are given to the Court **[Check if applicable: 1. and/or 2.]**
1. A citation to the surviving spouse shall be required in this estate.
2. Pursuant to R.C. 2109.301(B), the estate is not required to file a partial account or a final account. A Certificate of Termination shall be filed herein.
- B. This estate is being opened to pursue a claim for wrongful death or survival action as a result of personal injury, and there are no assets to administer.
- C. There are probate assets to administer, and this estate will remain open to pursue a claim for wrongful death or survival action as a result of personal injury.
- D. This estate is being opened solely for the purpose of filing or continuing a cause of action in favor of or against the decedent's estate.

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

The undersigned hereby gives notice to extend the administration beyond six months for the following reason(s):

- An Ohio estate tax return must be filed for the estate.
- A proceeding contesting the validity of the decedent's will pursuant to R.C. 2107.71 has been commenced.
- The surviving spouse has filed an election to take against the will.
- The administrator or executor is a party in a civil action, Case No. _____ in _____
- The estate is insolvent.

An account or certificate of termination shall be due no later than thirteen months after the appointment of the fiduciary.

CERTIFICATION

THE UNDERSIGNED HAS PERSONALLY EXAMINED THE INDEX OF WILLS DEPOSITED PURSUANT TO R.C. 2107.08 AND CERTIFIES THAT ALL WILLS ON DEPOSIT, REGARDLESS OF THE DATE OF EXECUTION, HAVE BEEN ADMITTED TO PROBATE OR FILED FOR RECORD PURPOSES ONLY. [Sup. Rule 59(A)]

- _____
 Attorney for the Estate
 Fiduciary for the Estate

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

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, 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.

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

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 four months after the filing of the certificate for estates of decedents who die before January 1, 2002, and no more than three months after the filing of the certificate for estates of decedents who die on or after January 1, 2002.

_____	_____
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**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

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 the William Howard Taft Center, 230 East Ninth Street, Ninth Floor, Cincinnati, Ohio 45202-2145 on _____, _____, 20____. 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 HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

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

Ralph Winkler, Probate Judge

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

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 HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

**APPOINTMENT OF APPRAISER
[R.C. 2115.02 & 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

Ralph Winkler, Probate Judge

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

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, legatees and devisees, known to applicant, which list includes those persons entitled to administer the estate.

The estimated value of the estate is:

Personal property	\$	
Annual real property rentals	\$	
Subtotal, personalty and rentals	\$	
Real Property	\$	
Total estimated estate	\$	
Applicant owes the estate	\$	
The estate owes applicant	\$	

[Check one of the following four paragraphs]

- Applicant says that decedent's Will requests that no bond be required of, 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

Typed or Printed Name

Address

Phone Number (include area code)

Attorney Registration No. _____

Applicant

Typed or Printed Name

Address

Phone Number (include area code)

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.

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____ , DECEASED

CASE NO. _____

**ENTRY SETTING HEARING ON APPLICATION TO
ADMINISTER ESTATE**

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

Date

Ralph Winkler, Probate Judge

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

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.

Principal Date

Surety Date

by _____ by _____
Attorney in Fact 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 HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

WAIVER OF RIGHT TO ADMINISTER

Application of _____
for appointment to administer decedent's estate.

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 the applicant, hereby waive appointment to administer the estate.

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

**NOTICE AND CITATION OF HEARING ON APPOINTMENT OF FIDUCIARY
[R.C. 2113.06 and 2113.07]**

To the following persons:

Name	Address
Name	Address
Name	Address
Name	Address
Name	Address

_____ has filed an application in this Court, asking to be appointed to administer decedent's estate.

The hearing on the application will be held _____ at _____ o'clock _____ .M in this Court.

The Court is located at the William Howard Taft Center, 230 East Ninth Street, Ninth Floor, Cincinnati, Ohio 45202-2145.

You are one of the persons entitled to administer decedent's estate, and if you wish to be considered for appointment to do so you must apply to this Court. If you do not apply, it will be considered that you renounce your right to administer the estate. The Court may appoint any suitable and competent person to administer the estate, giving due weight to relative priority of right to do so. Even if you decline appointment yourself, if you know of any reason why the above applicant is not suitable or competent, you should appear and inform the Court.

Ralph Winkler, Probate Judge/Deputy Clerk

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

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

Ralph Winkler, 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.

[Seal]

Ralph Winkler, Probate Judge/Clerk

by: _____

Date

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

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

Ralph Winkler, 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.

[Seal]

Ralph Winkler, Probate Judge/Clerk

by: _____

Date

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RAPLH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

CERTIFICATE OF FEE AGREEMENT

The undersigned, being the attorney and fiduciary for the above decedent's estate, hereby certify that he/she has entered into a dated written fee agreement in compliance with Local Rule 71.1 (B) on _____, 20_____.

If the attorney for the estate is also the fiduciary or if the fiduciary is an attorney associated with the attorney for the estate, the attorney certifies that a copy of the fee agreement has been provided to all residual beneficiaries of the probate estate.

Fiduciary

Date

Attorney

Date

Ohio Supreme Court Number

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

**FIDUCIARY'S ACCEPTANCE
(EXECUTOR/ADMINISTRATOR)**

I, the undersigned, hereby accept the duties which are required of me by law, and such additional duties as are ordered by the Court. As executor/administrator of the estate I will:

- 1) Give notice of the admission of the will to probate to all heirs and beneficiaries within 2 weeks and file a certificate of notice of probate of will within 2 months.
- 2) Make and file any inventory of the real and personal assets of the estate within 3 months after appointment, or such time as extended by the Court.
- 3) Deposit funds which come into my hands in a lawful depository located within this State. Estate checking accounts must provide canceled checks, as these canceled checks may be required to prove the accounts.
- 4) Keep estate funds in separate estate accounts at all times during the administration of the estate.
- 5) Invest all funds, in a lawful manner.
- 6) Make and file the final and distributive account within 6 months following my appointment, or such time thereafter as extended by the Court.
- 7) File all tax documents as required by law.
- 8) Maintain adequate insurance to reasonably protect any property that I may hold as a fiduciary.
- 9) Obey all Orders of the Court.

I acknowledge that I am subject to removal as such fiduciary if I fail to perform such duties. I further acknowledge that I am subject to possible civil and criminal penalties for improper conversion of the property that I hold as a fiduciary.

NOTICE: Attorney fees shall not be paid until the final account is prepared for filing unless otherwise approved by the Court.

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. [R.C. 2109.02].

Date

(Executor/Administrator)

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

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 Estate	\$ _____
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 \$ _____

(attach sheet listing any additional automobiles transferred to surviving spouse)

Total value [not to exceed \$65,000.00].....\$ _____

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 will, and waives notice of the taking of the inventory.

Attorney

Fiduciary

Attorney Registration No. _____

APPRAISER'S CERTIFICATE

The undersigned appraiser agreed 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.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

CASE NO. _____

Page _____ of _____ pages.

Item	Appraised	Value
		\$

Fiduciary

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

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.

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

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 the William Howard Taft Center, 230 East Ninth Street, Ninth Floor, Cincinnati, Ohio 45202-2145.

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 HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

ENTRY SETTING HEARING ON INVENTORY

The Court sets _____ at _____ o'clock ____ M.
as the date and time for hearing the inventory of decedent's estate. The Court orders that
notice of the hearing on the inventory be given to all parties entitled to notice.

Date

Ralph Winkler, Probate Judge

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____ , DECEASED

CASE NO. _____

ENTRY APPROVING INVENTORY

The Inventory and Appraisal in the within estate having been filed and those persons entitled to notice of the hearing on the inventory of said estate having either waived notice of the same or been given notice of same in accordance with law, the inventory and appraisal is hereby approved.

Ralph Winkler, Probate Judge

Attorney

Attorney Registration No. _____

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____

CASE NO. _____

APPLICATION FOR SALE/TRANSFER OF MOTOR VEHICLE

The undersigned, fiduciary of the estate, represents that (s)he is in possession of the following described motor vehicle belonging to the estate.

Year _____ Body Type _____ Model _____ Make _____

Mfrs. Serial No. _____ Cert. of Title No. _____

Applicant states that the following person is entitled to such motor vehicle:

- by virtue of the Will;
- by the statute of descent and distribution;
- by family allowance;
- by purchase.

Applicant requests that the above described motor vehicle be transferred to.

Name

Address

Necessary Consents (except for sales):

Applicant

ENTRY AUTHORIZING SALE/TRANSFER OF MOTOR VEHICLE

The Court finds that the application is well taken and that the above transferee is entitled to such motor vehicle. It is therefore ordered that said fiduciary transfer said motor vehicle as prayed for.

Ralph Winkler, Probate Judge

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RAPLH WINKLER, 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 the 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 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.

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

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

ESTATE OF _____, DECEASED

CASE NO. _____

CERTIFICATE OF TRANSFER

NO. _____

[Check one of the following]

- Decedent died intestate.
- Decedent died testate.

Decedent died on _____ owning the real property described in this certificate. The persons to whom such real property passed by devise, descent or election are as follows:

Name	Residence Address	Transferee's share of decedent's interest

[Complete if applicable] The real property described in this certificate is subject to a charge of \$ _____ in favor of decedent's surviving spouse, _____ in respect of the unpaid balance of the specific monetary share which is part of the surviving spouse's total intestate share.

CASE NO. _____

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

Prior Instrument Reference:

Parcel No:

This instrument was prepared by _____

ISSUANCE

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

Ralph Ankler, Probate Judge

AUTHENTICATION

I certify that the above 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

Ralph Ankler, Probate Judge

By: _____
Deputy Clerk

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

ESTATE OF _____, DECEASED

CASE NO. _____

CERTIFICATE OF TRANSFER

NO. _____

[Check one of the following]

Decedent died intestate.

Decedent died testate.

Decedent died on _____ owning the real property described in
this certificate. The persons to whom such real property passed by devise, descent or election are as follows:

Name	Residence Address	Transferee's share of decedent's interest

[Complete if applicable] The real property described in this certificate is subject to a charge of \$ _____ in favor of decedent's surviving spouse, _____ in respect of the unpaid balance of the specific monetary share which is part of the surviving spouse's total intestate share.

CASE NO. _____

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

Prior Instrument Reference:

Parcel No:

This instrument was prepared by _____

ISSUANCE

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

Ralph Winkler, Probate Judge

AUTHENTICATION

I certify that the above 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

Ralph Winkler, Probate

Judge By: _____
Deputy Clerk

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

ENTRY ISSUING CERTIFICATE OF TRANSFER

The Court finding that the above application contains 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

Ralph Winkler, Probate Judge

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

STATUS REPORT

Pursuant to the Rules of Superintendence and the Local Rules of Court, the fiduciary states that the estate cannot be closed at this time and hereby submits this written Status Report. **[Check whichever of the following apply]:**

- There is a wrongful death or survival action pending in (specify Court and Case No.)

Expected Trial Date _____
- There is litigation (in favor of/against) the estate pending in (specify Court and Case No.)

Expected Trial Date _____
- The estate is being audited by Internal Revenue Service or Ohio Department of Taxation. Expected Date of Resolution _____
- There are insufficient liquid assets in the estate to pay the Ohio Estate Taxes, and the estate has been granted an extension to pay the same. Extension Date _____
- The primary asset of the estate is real property which has not been sold or transferred.
Expected Date of Sale or Transfer _____
- Other (please provide specifics) _____

- Additional explanation is attached hereto.

Attorney for Estate

Fiduciary

Attorney Registration Number

Date

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

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
		\$	\$

Note:

2117.06(K) states: "The distributee maybe liable to the estate up to the value of the distribution and maybe 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 (13) 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

CASE NO. _____

Page _____ of _____ pages

Item	Voucher No.	Value or Amount	Value or Amount
		\$	\$

Fiduciary

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

ASSETS REMAINING IN FIDUCIARY'S HANDS

[Attach to partial or final fiduciary's account]

Page _____ of _____ pages

The estate assets remaining in fiduciary's hands are recapitulated as follows:

Tangible personal property	\$	
Intangible personal property	\$	
Total Personal property	\$	
Real Estate	\$	
Total assets remaining in fiduciary's hands	\$	

Following is an itemized statement of estate assets remaining in the fiduciary's hands.

Item	Value or Amount	Value or Amount
	\$	\$

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

ESTATE OF _____
CASE NO. _____

**CERTIFICATION OF SERVICE OF ACCOUNT
TO HEIRS OR BENEFICIARIES
[R.C. 2109.32]**

This is to certify that a true and accurate copy of the _____ account was
Type of Account

served _____ upon all beneficiaries of the estate except'.
Date

The following heir or beneficiary whose address is unknown: _____

The following beneficiaries of a specific bequest or devise who has received his of her
distribution and for which a receipt has been filed or exhibited with the Court:

Attorney

Fiduciary

Attorney Registration No. _____

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

**TRUST OF
GUARDIANSHIP OF
ESTATE OF _____**

CASE NO. _____

ENTRY SETTING HEARING ON ACCOUNT

The Court sets _____ at _____ o'clock ____ M.
as the date and time for hearing on the current/final account in this matter. If notice is required,
the Court orders that notice of the hearing on the account be given to all parties entitled to notice,
who do not waive the same, at least fifteen (15) days prior to the date and time set for
hearing.

Date

Ralph Winkler, Probate Judge

Attorney

Attorney Registration No. _____

**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

**TRUST OF
GUARDIANSHIP OF
ESTATE OF** _____

CASE NO. _____

NOTICE OF HEARING ON ACCOUNT

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 the William Howard Taft Center, 230 East Ninth Street, Ninth Floor, Cincinnati, Ohio 45202-2145.

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 HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

**TRUST OF
GUARDIANSHIP OF
ESTATE OF** _____

CASE NO. _____

WAIVER OF NOTICE OF HEARING ON ACCOUNT

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

_____	_____
_____	_____
_____	_____
_____	_____
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**PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE**

**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 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.
- This is a final account of a (deceased) (removed) (resigned) fiduciary. The estate shall remain open.
- This is a final account of the guardianship for the estate only. This matter shall continue as a person only guardianship.
- This is a final account of a beneficiary of a trust. The trust estate shall remain open for other beneficiaries of the trust.

Date

Ralph Winkler, Probate Judge