INSTRUCTIONS FOR FULL ADMINISTRATION OF AN ESTATE

THE EMPLOYEES OF PROBATE COURT ARE UNABLE TO PROVIDE ASSISTANCE WITH COMPLETING ALL FORMS

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. **We accept cash, cashier's checks or all major credit/debit cards as payment for the fee. No personal checks or money orders will be accepted.**

The forms may be obtained from the Information 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
Self-Representation Form (270.01) - Sign and Complete information if you **do not** have legal representation	On opening any estate
1. Surviving Spouse, Next of Kin, Legatees and Devisees (1.0) [R.C. 2105.06] - On *front* of form, list all *next of kin* (those people who are or would be entitled to inherit *if* there were no will), on *back* of form, list all others named in will (if decedent left a will). - Be sure to specify *complete* addresses of all of those listed.	On opening any estate
Classification Form for Estates (H.C. 1.01) - 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 Probate Court website www.probatect.org select court records, type in the last and first name of decedent, check for	On opening any estate

"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.	
2. Application to Probate Will (2.0) [R.C. 2107.11, 2107.18, 2107.19] - Complete information **(Note: If no Will, proceed directly to Step 3)**	On opening estate and presentation of Will
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)] - 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.	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)** If notice is given within 120 days of appointment **If date of death is on or before 1/1/2002 notice must be given within 2 weeks of admitting will to probate**
Entry Admitting Will to Probate (2.3) [R.C. 2107.18] - Fill in the name of the decedent only, the magistrate will sign and date the form.	Upon presentation of Will
Certification of Service of Notice of Probate of Will (2.4) [R.C. 2107.19(A)(3)] - 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>**	Within 120 days of appointment **If date of death is on or after 1/1/2002 within 2 months of admitting will to probate**
Election of Spouse [R.C. 2106.01] - 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**	Anytime after death of decedent but not later than one month after service of citation to elect **If date of death is on or**

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 citation** - 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.**	**after 1/1/2002 Surviving Spouse must exercise spousal rights within 5 months from date of service or those rights are waived.**
Will Contest [R.C. 2107.71, 2107.76] No form	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
Application for Authority to Administer Estate (H.C.4.0) [R.C. 2109.02, 2113.07] - 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.	On opening any estate
Entry Setting Hearing on Application to Administer Estate (HC 4.01) - 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.	With the filing of the Application to Administer
Waiver of Right to Administer Estate (4.3) [R.C. 2113.07] - All next of kin and the surviving spouse (everyone on front of	Filed with application or before appointment

form 1.0) must waive their right to administer estate, if the person applying is not the person nominated in the will.	
3. Notice of Hearing on Appointment of Fiduciary (4.4) - 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.	Prior to appointment
Fiduciary's Acceptance (H.C. 4.8) - Complete name of decedent, sign and date. **Note: The Court will hold applicant responsible for the duties described on the form.**	At the time of filing the Application to Administer
Entry Appointing Fiduciary; Letters of Authority (4.5) [R.C. 2113.05, 2113.06] - Complete form in duplicate. - The court clerk will sign and date if approved by Judge or magistrate.	At the time of filing the Application to Administer
Appointment of Appraiser and Entry (H.C. 3.0) [R.C. 2115.06] - 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.	By the time of filing Inventory
4. Inventory and Appraisal (6.0) [R.C. 2115.02] - 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.	Within three months after appointment unless Court grants extension for good cause
Schedule of Assets (6.1) - 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.	Filed with 6.0
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]	Filed before approval of inventory Served by ordinary mail on all parties ordered by court

- 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.	unless waived
Entry Setting Hearing on Inventory (H.C. 6.4) [R.C. 2115.16] - Fill in the name of decedent only, the magistrate will fill in hearing date & time and sign & date form	Upon filing of the Inventory
Notice of Surviving Spouse of Taking of Inventory [R.C. 2115.04] Waiver of notice by spouse on back of Form 6.0	At least five days before taking of inventory
Exceptions to Inventory [R.C. 2115.16] No form	May be filed at any time prior to five days before hearing on inventory
Hearing on Exceptions to Inventory [R.C. 2115.16]	As set by Court
Entry Approving Inventory (H.C.6.5) [R.C. 2115.16] - Fill in the name of decedent and have attorney sign	After hearing on inventory or hearing on exceptions to inventory
Certificate of Fee Agreement	Due before or with the filing of the Inventory
Report of Newly Discovered Assets [R.C. 2113.69] No form	Within thirty days of receipt of such assets
Collection of Assets [R.C. 2113.25]	Within nine months of appointment of fiduciary

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
Election of Surviving Spouse to Receive Mansion House [R.C. 2106.10] Form H.C. 108.40	At or before final account
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
Application for Certificate of Transfer (12.0) [R.C. 2113.61] - Complete form - Only assigned Magistrate can approve	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**

Application to Distribute Personal Property in Kind [R.C. 2113.55] Forms 10.0, 10.1, 10.2	When desired
Determination of Heirship [R.C. 2123.01 et seq.] No form	Before distribution of estate
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
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

	Application and Entry for Fixing Attorney Fees [R.C. 2113.36] - Need copy of hours attached to application - If amount over the guideline, application is set before the Judge. No form	Prior to filing of Final Account
	Notice of Hearing on Attorney Fees (H.C. 210.07) Waiver and Consent to Attorney Fees (H. C. 210.06) - 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.	
	Consent to Attorney Fees (H.C. 210.05) - If the attorney fees are within the guidelines, the residual beneficiaries may sign consent forms in lieu of an application and entry.	
	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
	Certificate of Termination (13.6) [R.C. 2109.301(B)(1)] - May be used if there is either sole heir/sole fiduciary or co-heirs/co-fiduciaries - Will contest period must be expired	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) - Signed by all residuary beneficiaries of the estate	May be filed in the place of a fiduciary's account.
	Affidavit and Entry in Lieu of Partial Account (H.C. 113.01) - Utilized in wrongful-death cases only	May be filed in the place of a fiduciary's account
5.	Fiduciary's Account (13.0) [R.C. 2109.30] - Fiduciary must complete an exact accounting of all transactions that have occurred during pending estate	First account due 12 months from date of appointment; subsequent accounts due annually thereafter **for dates**

administration. - Complete form. - Account will be left to be reviewed by an account clerk. - Canceled checks, bank statements, and titles to personal property, closing statements are left with the account.	**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) - Specifically list receipts and disbursements of decedent's estate	
Assets Remaining in Fiduciary's Hands (13.2) - Complete form if filing a partial account. Specifically describe those assets of decedent's estate remaining in fiduciary's hands	
Certification of Service of Account to Heirs and Beneficiaries (13.90) - **Required when presenting any partial or final account with a date of death 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.	**Only used for estates opened with dates of death on or after 1/1/2002**
Notice to Extend Administration (13.10) - 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.	**Only used for estates opened with dates of death on or after 1/1/2002**
Application and Entry to Extend Administration (H.C. 13.81) - Complete form. - Must be signed by fiduciary. - Must be approved by **assigned magistrate only.** - Filed with any partial account, affidavit in lieu of 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	**Only used for estates opened with dates of death on or after 1/1/2002**

signed by the fiduciary for the estate and the real estate agent.	
Entry Setting Hearing on Account (213.8) [R.C. 2109.32] - Fill in the name of the decedent and have attorney sign. The account clerk will fill in the hearing date & time.	Not earlier than thirty days after filing of account
Waiver of Notice of Hearing on Account (13.7) Notice of Hearing on Account (13.5) (FINAL ACCOUNT) [R.C. 2109.33] - 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 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.	Filed before approval of acct. Served at least fifteen days prior to hearing on all parties ordered by Court unless waived.
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, expiration of the will contest period or before the surviving spouse has made an election or the time for making an election has expired.

Information Purposes Only: Effective April 6, 2017, any number of vehicles now be transferred to the surviving spouse if not a specific bequest and the total value of all vehicles do not exceed $65,000.00.

[Form provided by Clerk of Courts]

Ralph Winkler
JUDGE, PROBATE COURT
HAMILTON COUNTY, OH

A CITIZEN'S GUIDE TO COMMUNICATING WITH THE JUDGE AND MAGISTRATES

Why can't I communicate directly with the judge or magistrate on my case?

If the matters are contested, judges and magistrates are not allowed to communicate with individual parties. This is what the law calls an *ex-parte* communication (this is when a judge or magistrate only communicates with an individual party, on their own, without the knowledge of all parties to a case). In order to keep the court process as fair, equal and as transparent as possible, *ex-parte* communication is strictly forbidden. It is unfair for the court to share information without all of the parties present.

You cannot email the judge or magistrate, as the email is considered an *ex-parte* communication. In addition, emails are not pleadings (motions.) You cannot write a personal letter to the judge or magistrate as this may be considered an *ex-parte* communication.

How can I speak to the judge or magistrate on my case?

Typically, to speak to the judge or magistrate on your case, you must file a written motion with the court explaining what you want the court to do and all motions become part of the public record. You also have to send a copy of whatever you file to the other parties, or their attorney if they are represented by an attorney (this is called "service"). A motion is not considered an *ex-parte* communication because all parties are officially notified. You may be required to pay a filing fee when you file your written motion. Please note, there is no fee if you wish to speak to the magistrate in an uncontested matter, on their assigned walk-in days.

I've heard there's always a magistrate on duty to hear arguments immediately – what does that mean?

There is a magistrate on duty every business day. The on-duty magistrate may answer generic procedural questions. The on-duty magistrate may also discuss matters in an uncontested case. For all other matters, the on-duty magistrate is prohibited from speaking with you. To address the court for these matters, you must file a written motion. The on-duty magistrate will set the matter for hearing before the magistrate assigned on your case or the judge.

What if I need to tell the judge or magistrate something I don't want the other party to know about?

Unfortunately, you cannot withhold information from another party to your case. In order to keep the case fair to everyone involved, as soon as you tell the judge or magistrate something, you must also tell the other parties. All sides must have an opportunity to respond to the information that you have shared with the court.

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

IN THE MATTER OF: _____

CASE NO. _____

SELF-REPRESENTATION ACKNOWLEDGMENT

I acknowledge that I have read, understand and agree with all of the following statements:

1. The Court has recommended that I hire an attorney to represent me in this case. However, I have chosen to proceed with this case without the assistance of an attorney.

2. The Court and its Deputy Clerks are prohibited by law from providing legal advice. I will follow the instructions provided in the form packets and on the Court's website, www.probatect.org.

3. I am responsible for understanding and correctly applying any statutes, case law, rules, regulations, policies, and procedures that relate to this case, including, but not limited to, the Ohio Revised Code, Rules of Superintendence for the Courts of Ohio, Hamilton County Probate Court Local Rules of Practice, and the Ohio Rules of Civil Procedure.

4. The same standards that apply to attorneys and persons represented by attorneys in similar probate hearings will apply to myself.

5. If I do not fulfill my responsibilities in this case as required by law, I may be subject to sanctions or penalties as provided by law, which may include removal as fiduciary or being required to be represented by an attorney.

6. I may be personally liable to any person or entity that suffers damages as a result of anything I do or fail to do in this case that does not comply with the legal requirements.

_____
Fiduciary/Applicant/Guardian

_____
Typed Printed Name

_____
Address

_____
City/State/Zip

_____
Telephone Number (include area code)

_____
Email

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.

CASE NO. _____

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 0hio 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 Januray 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.

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

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	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.

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. in Room _____ 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	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 decedents 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.

_____

Ralph Winkler, Probate Judge/Clerk

by: _____

[Seal]

_____

Date

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH 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.

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

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

ESTATE OF _____ **, DECEASED**

CASE NO. _____

SCHEDULE OF ASSETS

(Attach to inventory and appraisal)

Page _____ of _____ pages.

(Insert a check in the column "Appraised" opposite an item if it was valued by the appraiser. Leave blank if the readily ascertainable value was determined by fiduciary)

Item	Appraised	Value
		$

_____
Fiduciary

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. **There is no requirement to appear for this hearing if you have no exceptions to the inventory.** 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. in Room _____ 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;
- ☐ other _____

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
RALPH 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.

☐ 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].**

CASE NO. _____

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

_____
Attorney for Applicant

_____
Typed or Printed Name

_____
Address

_____
City, State, Zip Code

_____
Phone Number (include area code)

Attorney Registration No. _____

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. _____

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.

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. _____

CERTIFICATE OF TERMINATION

[R.C. 2109.301]

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 for the administration of probate assets 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.

_____
Ralph Winkler, Probate Judge

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

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

ESTATE OF _____ **, DECEASED**

CASE NO. _____

RECEIPTS AND DISBURSEMENTS

[Attach to fiduciary's account]

Page _____ of _____ pages

Following is an itemized statement of receipts and disbursements by the fiduciary in the administration of the estate.

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

_____
Fiduciary

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
	$	$

CASE NO. _____

Page _____ of _____ pages

Item	Value or Amount	Value or Amount
	$	$

_____

Fiduciary

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

ESTATE OF _____

CASE NO. _____

APPLICATION TO EXTEND ADMINISTRATION

[R.C. 2109.301, Sup. R. 78(B) and (C)]

This is the ☐ initial application ☐ subsequent application to extend administration of the estate.

The undersigned fiduciary applies to extend the administration of the estate. 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 the prescribed 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: _____

_____

Ralph Winkler, Probate Judge

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 9:00 o'clock A 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. **There is no requirement to appear for this hearing if you have no exceptions to 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.

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

☐ **APPROVED**
☐ **REJECTED** (LETTER ATTACHED)

Court Use Only

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

IN RE: _____

CASE NO. _____

NOTICE OF RETRIEVING DOCUMENTATION FOR ACCOUNTS

Check the box indicating how the supporting documentation, copies and/or account forms left with the accounting department should be handled after the account is approved/rejected.

☐ Mail back documents in enclosed self-addressed stamped envelope. If no envelope – will be charged to mail back

☐ Place documents in the Attorney Mailbox (will pick up within 30 days).
Mailbox No. _____

☐ Destroy documents (shred).

THESE ARE THE MOST COMMON REASONS FOR REJECTIONS SO PLEASE MAKE SURE THESE REQUIREMENTS HAVE BEEN COMPLETED
(If pertains to the type of Account being filed)

☐ Starting balance matches Inventory/most recent Partial/Current Account

☐ Both Attorney and Fiduciary Signed Account

☐ Total Receipts and Distributions balance

☐ Newly Discovered Asset (Form 106.11)

☐ Attorney Fees (Consents - Form 210.05 or Application and Entry with timesheets for fees over $4,000)

_____
Signature

_____
Date

_____
Print Name
☐ Fiduciary ☐ Attorney

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

MATTER 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.

Name of Fiduciary: _____

_____ _____
Date Ralph Winkler, Probate Judge