INSTRUCTIONS FOR FILING AN APPICATION FOR CONSERVATORSHIP

These instructions are intended as a guideline only and should not be relied upon as a comprehensive list of duties in a conseratorship.

A person who is mentally competent but physically infirm can apply to have someone appointed the Conservator of his or her Person, Estate or Person & Estate.
The applicant and proposed conservator must appear in Court for the hearing.

When a Conservator of the Estate or a Conservator of the Person & Estate is appointed there must be joint control of those monies between the conservator and an attorney.
The Conservator must also post a bond to protect the monies of the estate.

A filing fee is required at the time of filing. 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 East 9th Street, Cincinnati, Ohio or by downloading the forms form the web site.

PROCEDURAL STEPS	**WHEN TO FILE**
STEP 1: COMPLETE THE FOLLOWING FORMS FOR THE INITIAL FILING	
Self-Representation Form (270.01) - Sign and Complete information if you **do not** have legal representation	
Application for Appointment of Conservator (20.0) - Complete information - Applicant is the person selecting the conservator	At the time of initial filing
Next of Kin of Proposed Conservatee (20.01) - List all *next of kin* (those people who are closest blood relatives) of the applicant. - Be sure to specify *complete* addresses of all those listed.	At the time of initial filing
Judgment Entry Setting Hearing on Application for Appointment (15.01) - Fill in the name of the applicant only, the magistrate will fill in hearing date & time and sign & date the form.	At the time of initial filing
Fiduciary's Acceptance (H.C. 20.4) - Complete name of applicant and have proposed conservator sign and date the form. **Note: The Court will hold the conservator responsible for the duties described on this form.**	At the time of initial filing
Authorization to Release Confidential Information (H.C. 15.11) - The proposed conservator shall sign in presence of a witness and have witness sign.	At the time of initial filing

THE NEXT GROUP OF FORMS IS NOT NEEDED AT THE INITIAL FILING.	
Conservator's Bond (H.C. 20.3) - For Conservatorship of the Estate, the conservator is required to execute a bond when the applicant's total personal property value is over $10,000. - Conservator must execute and date form. - **Bond must be executed by a surety company in front of court personnel.** - The bond shall be twice the value of the applicant's personal property.	Once signed by the applicant, the bond form needs to be left with the court in order for the agent of the surety company to execute the bond in the presence of the clerk. May be left with the court anytime prior to the hearing.
Oath of Conservator (20.9) - Complete form, but do not sign. Oath must be executed in front of a magistrate.	Preferably at the time of initial filing, if not, day of hearing.
Letters of Conservatorship (20.2) - Complete form. - The court clerk will sign and date.	Preferably at the time of initial filing, if not, day of hearing.
Judgment Entry – Appointment of Conservator (20.1) - Complete form. - The court will execute if the conservatorship is granted.	Preferably at the time of initial filing, if not, day of hearing.
Conservator's Inventory (20.5) - If the conservatorship is for the Estate or Person & Estate, the conservator must file an Inventory specifically listing the assets of the applicant and the value of those assets.	3 months from date of appointment
Application and Order Authorizing Release of Funds (20.6) - Used to authorize the conservator to access funds on deposit. - Specifically list the name of the financial institution, the type of account and the account number.	Anytime after the appointment has been granted
Application and Order Authorizing Expenditure of Funds (20.7) - All expenditures made by the conservator have to be approved by the court if a Conservator of the Estate is established. - Complete form - List who is to be paid, purpose of the expenditure, and amount of expenditure. - **All expenditures are to be approved prior to expending the funds.**	Anytime after the **Conservator's Inventory** has been filed
Conservator's Account (H.C. 20.8) - Must be filed annually by the conservator of the estate. - Specifically list the assets of the conservatee that were listed on the Inventory (20.5) plus all income and disbursements.	Every year from date of appointment.
Entry Setting Hearing on Account (H.C. 213.8) - Fill in the name of the applicant only, the Court will fill in hearing date & time and sign & date the form.	At the time of filing the account
Notice of Hearing on Account (H.C. 13.5) - When filing a ***final*** account, the conservator shall serve certified mail notice on the conservatee, unless a waiver (13.7) is	Anytime prior to the date of the account hearing.

obtained. - See Local Rule 64.1 (D).	
Waiver of Notice of Hearing on Account (H.C. 13.7)	Anytime prior to the date of the account hearing.
Entry Approving and Settling Account (H.C. 13.3) - Complete form. - Present to an account clerk for further processing.	
STEP 2: ASSIGNING OF MAGISTRATE, REVIEWING OF FORMS, AND SETTING HEARING DATE.	
When all forms have been completed, present them to the magistrate's assistant at the information desk on the 9th Floor of Probate Court for a magistrate to be assigned. All forms are then taken to a magistrate for review and setting of hearing date.	
STEP 3: FILING OF FORMS WITH CASHIER	
All forms are taken to the cashier who will assign a case number. At this time, the cashier will require the payment of the filing fee. The cashier will stamp the case number on all the papers plus one set of copies, if provided, and clock in the original forms that can be docketed that day. After clocking in the forms, the cashier will place the forms in a file folder and give it to you to take to the Issue Desk.	
STEP 4: THE HEARING	
At the date and time of the hearing, you (the applicant), the proposed conservator (and your attorney, if attorney is obtained) should report to the 9th Floor of the Probate Court to the assigned magistrate. (The magistrate will already have the file with the forms you initially filed.) The magistrate will conduct the hearing and if the magistrate finds a conservator should be appointed, a Decision of Magistrate and Entry Appointing Conservator will be completed. The magistrate will escort you to the Issue Desk and have the Letters of Conservatorship issued if: - Bond has been executed by surety if conservatorship includes estate. - The Statement of Joint Control and Entry Appointing Co-Signer is also filed if conservatorship includes estate.	

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

CONSERVATORSHIP OF _____

CASE NO. _____

APPLICATION FOR APPOINTMENT OF CONSERVATOR

(R. C. 2111.021)

I, _____, Petitioner, hereby state that I am a competent adult but am physically infirm. I request that:

1. Name of Proposed Conservator _____

   Street _____

   City _____ , Ohio (Zip) _____ Telephone (____) _____

   be appointed conservator of my:

   [ ] Person and Estate [ ] Person Only [ ] Estate Only

2. The length (time period) of the conservatorship is:

   [ ] Indefinite [ ] Definite - to _____

3. (If "Person Only" or Person and Estate" is checked), I give the following power over my PERSON to the:

   a. Conservator:

      [ ] (1) All powers that a guardian would have under the guardianship laws of Ohio.

      [ ] (2) Limited to the power to _____

      _____

      _____

   b. Court

      [ ] (1) All powers that a Court would have under the guardianship laws of Ohio.

      [ ] (2) Limited to the power to _____

      _____

      _____

4. (If "Estate Only" or Person and Estate" is checked), I give the following power over my ESTATE to the:

   a. Conservator:

      [ ] (1) All powers that a guardian would have under the guardianship laws of Ohio.

      [ ] (2) Limited to the power to _____

      _____

      _____

b. Court

[ ] (1) All powers that a Court would have under the guardianship laws of Ohio.

[ ] (2) Limited to the power to _____

_____

_____

c. The following of my property is subject to the foregoing powers:

[ ] (1) All property. (attach description of property)

[ ] (2) Only the property listed as follows:

_____

_____

_____

5. If the application is for a conservatorship of the estate:

a. The estate to be placed under conservatorship is:

Personal Property	$ _____
Real Property	$ _____
Annual Rents	$ _____
Other Annual Income	$ _____
TOTAL	$ _____

b. A bond in the amount of $ _____ is attached. (R.C. 2109.04(A)(I))(FORM 20.30)

6. Service of notice of the conservatorship is to be given to:

[ ] None [ ] Same as Guardianship [ ] As Listed on Form 15.0

Based on the foregoing information, I do hereby petition the Court to appoint a Conservator for myself, and do so freely and of my own will. I certify that all information and statements contained in this application and the attached exhibits are correct to the best of my knowledge and belief.

_____
Date

_____
Attorney's Signature

_____
Applicant's Signature

_____
Type or print Attorney's Name

_____
Type or print Applicant's Name

_____
Street

_____
Street

_____
City, State, Zip Code

_____
City, State, Zip Code

( )
_____
Telephone Number - Include Area Code

( )
_____
Telephone Number - Include Area Code)

_____
Supreme Court Registration Number

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATOSHIP OF _____

CASE NO. _____

NEXT OF KIN OF PROPOSED CONSERVATEE

(R.C. 2111.04)

(NOTE: Specify age and birthdate of each minor under 16 on the line containing the minor's name. List the name and address of the minor's parent, guardian or custodian on the name and address lines following the minor's address.)

	Service Waived		Relationship	Birthdate Of Minor
1.	☐	Name _____	_____	_____
		Address _____		Zip _____
2.	☐	Name _____	_____	_____
		Address _____		Zip _____
3.	☐	Name _____	_____	_____
		Address _____		Zip _____
4.	☐	Name _____	_____	_____
		Address _____		Zip _____
5.	☐	Name _____	_____	_____
		Address _____		Zip _____
6.	☐	Name _____	_____	_____
		Address _____		Zip _____
7.	☐	Name _____	_____	_____
		Address _____		Zip _____
8.	☐	Name _____	_____	_____
		Address _____		Zip _____
9.	☐	Name _____	_____	_____
		Address _____		Zip _____
10.	☐	Name _____	_____	_____
		Address _____		Zip _____

_____ _____

Date Applicant

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF _____

CASE NO. _____

JUDGMENT ENTRY
SETTING HEARING ON APPLICATION FOR APPOINTMENT OF CONSERVATOR

This day _____ appeared in open Court, and filed an application for the appointment of (limited) conservator of the (person and estate) of _____. It is ordered that the _____ day of _____, _____ at _____ o'clock ___.M. in Room _____, be and is hereby fixed as the time of hearing said application before this Court.

_____ _____
Date Ralph Winkler, Probate Judge

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF_____

CASE NO. _____

FIDUCIARY'S ACCEPTANCE
CONSERVATOR
(R.C. 2111.14)

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

AS CONSERVATOR, I WILL:

1. Make and file an inventory of the real and personal estate of the ward within 3 months after my appointment.
2. Deposit funds which come into my hands in a lawful depository located within this state.
3. Invest surplus funds in a lawful manner.
4. Make and file an account annually, or as directed by the Court.
5. File a final account within 30 days after the conservatorship is terminated.
6. Inventory any safe deposit box of the conservatee.
7. Preserve any and all wills of the conservatee as directed by the Court.
8. Expend funds only upon written approval of the Court.

If I change my address or the conservatee's address, I shall immediately notify the Probate Court in writing. I acknowledge that I am subject to removal as such fiduciary if I fail to perform such duties. I also acknowledge that I am subject to possible penalties for improper conversion of the property which I hold as such fiduciary.

_____ _____

Date Fiduciary

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF _____

CASE NO. _____

OATH OF CONSERVATOR

(R.C. 2111.02(C))

(To be taken on Appointment of Conservator)

I, _____ Conservator of _____, will faithfully and completely fulfill my duties as Conservator, including the duty:

To file, and continue to make diligent efforts to file, a true inventory in accordance with the Ohio Revised Code, and report all assets belonging to the estate of my ward.

To file timely and accurate reports.

To file timely and accurate accounts.

To, at all times, protect my conservatee's interests and to make all decisions based on the best interest of my conservatee.

To apply to the Court for authority to expend funds prior to so doing.

To obey all orders and rules of this Court pertaining to conservatorships.

_____
Conservator

The above oath was taken and signed in my presence on this _____ day of _____ , _____ .

_____
Ralph Winkler, Probate Judge

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF _____

CASE NO. _____

AUTHORIZATION TO RELEASE CONFIDENTIAL INFORMATION

Name _____
Last First Middle

Date of Birth _____ Social Security Number _____

I hereby authorize the release of all confidential records and information concerning me to any officer or agent of the Hamilton County Probate Court for the purpose of an investigation pertaining to a proposed Conservatorship.

_____ _____
Witness Date Proposed Conservator

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF _____

CASE NO. _____

CONSERVATOR'S BOND

(R.C. 2109.04(A)(1))

Amount of this 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 conservatee's estate, including those imposed by law and such additional duties as may be required by the Court.

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

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

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

_____	_____
Date	Principal
_____	_____
Surety	Surety
by _____	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

CONSERVATORSHIP OF _____

CASE NO. _____

STATEMENT OF COUNSEL AND CONSERVATOR CUSTODY OF FUNDS

Undersigned counsel and conservator agree that the funds of the within conservatorship shall be maintained so that both signatures are required for their withdrawal and withdrawals will be made only in accordance with the order of this Court.

_____
Attorney

_____
Conservator

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF _____

CASE NO. _____

ENTRY APPOINTING CO-SIGNER FOR ESTATE FUNDS

The Court finds that is in the best interest of the ward and for safety and security reasons, that joint custody be established for the funds of the within estate.

Therefore the Court ORDERS that _____ be in joint control of all estate funds and authorizes him/her to sign all necessary instruments to execute this order.

_____
Ralph Winkler, Probate Judge

_____
Attorney

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF _____

CASE NO. _____

JUDGMENT ENTRY
APPOINTMENT OF CONSERVATOR
(R.C. 2111.021)

Upon hearing the application for appointment of a Conservator herein, the Court finds that the petitioner is a resident of this County, or has legal settlement herein; that this Court has jurisdiction; and that _____ is a competent, but physically infirm adult, who has voluntarily petitioned for, and the Court does declare _____ as his/her Conservator, and grants to the Conservator powers fully described in the Letters of Conservatorship.

The Court further finds that powers of the Court shall be:

☐ 1. Full powers as proscribed in the Laws of Guardianship of the State of Ohio.

☐ 2. Limited to the following powers, but not limited to the power to set bond, and all powers in Section 2111.021 of the Ohio Revised Code

_____

_____

_____

_____

The Court approves the bond as filed.

The Court orders Letters of Conservatorship issue to _____ _____ as provided by law.

_____ _____

Date Ralph Winkler, Probate Judge

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF _____

CASE NO. _____

LETTERS OF CONSERVATORSHIP

_____ is appointed Conservator

of _____

As Conservator, his/her powers are:

1. All powers conferred by the Guardianship laws of Ohio and the Rules of this Court over the conservatee's:
   ☐ Person and Estate ☐ Person Only ☐ Estate Only
2. Those guardianship powers, until revoked, are for an:
   ☐ Indefinite time period
   ☐ Definite time period to _____.
3. The Conservator's powers are limited to:

   _____

   _____

   _____
4. The following property of the conservatee is subject to the above power of the conservator:
   ☐ All property
   ☐ Only the property listed as follows:

   _____

   _____

   _____

The above-named Conservator has the power conferred by law to do and perform all the duties of Conservator as described.

_____ _____

Date Ralph Winkler, Probate Judge

NOTE TO FINANCIAL INSTITUTIONS

Funds being held in the name of the within-named Conservatee shall not be released to Conservator without a Court Order directing release of a specific fund and amounts thereof.

CASE NO. _____

CERTIFICATE OF APPOINTMENT AND INCUMBENCY

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

(SEAL)

_____
Ralph Winkler, Probate Judge

by _____
Deputy Clerk

_____
Date

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF _____

CASE NO. _____

CONSERVATOR'S INVENTORY

(R.C. 2111.14(A))

of the real and personal estate of the conservatee ____ with its value and the value of the yearly rent of the estate

List any safety deposit box and date and location of any will. $

RECAPITULATION

Total value of Personal Estate	$ _____
Total value of Real Estate	$ _____
Yearly rent of Real Estate	$ _____
Other annual income	$ _____
Total	$ _____

_____
Conservator

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF _____

CASE NO. _____

APPLICATION TO RELEASE FUNDS TO CONSERVATOR

Now comes the conservator of the above-named conservatee and makes application for authority to secure the release of the following funds of the ward.

The applicant further states that it is for the best interest of the conservatee that this authority be granted.

_____
Conservator

ORDER AUTHORIZING RELEASE OF FUNDS

This _____ day of _____, _____, this cause came on to be heard upon the application of the conservator of the above-named conservatee, and the evidence, and the Court being fully advised in the premises, hereby authorizes the release of the above funds to the conservator.

_____
Ralph Winkler, Probate Judge

PROBATE COURT OF HAMILTON COUNTY, OHIO
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF_____

CASE NO. _____

APPLICATION FOR AUTHORITY TO EXPEND FUNDS

Now comes the undersigned, conservator of the estate of the above-named conservatee and makes application for authority to expend funds for the best interest of the ward as follows:

[State amount requested, nature of expenditure, and the frequency and duration of authority requested. Attach additional explanation, documentation, or estimates as needed.]

_____
Conservator

ORDER AUTHORIZING EXPENDITURE OF FUNDS

This _____ day of_____ ,_____ , this cause came on to be heard upon the application of the conservator of the above named conservatee and the evidence, and the Court being fully advised in the premises, hereby authorizes the conservtor to expend funds as set forth in the Application.

_____
Ralph Winkler, Probate Judge

PROBATE COURT OF HAMILTON COUNTY
RALPH WINKLER, JUDGE

CONSERVATORSHIP OF _____

CASE NO. _____

CONSERVATOR'S ACCOUNT
(R.C. 2109.30)

_____ Account

From _____ To _____

Page _____ of _____ pages

Date	Description	Voucher No.	Receipts	Disbursements
	(Balance from previous account)		$	

CASE NO. _____

Page _____ of _____ pages

Date	Description	Voucher No.	Receipts	Disbursements

CASE NO. _____

RECAPITULATION

Total Receipts ……..... $_____

Total Disbursements ..... $_____

Balance Remaining ..... $_____

ITEMIZED STATEMENT OF ALL FUNDS, ASSETS AND INVESTMENTS

ITEM

$

_____
Attorney
Attorney Registration No. _____

_____
Conservator

_____
Typed or Printed Name

_____
Address of Conservator

_____
City, State, Zip Code

_____
Phone Number

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.

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

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 reviewed.

- ☐ 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
- ☐ Original Signature on 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 $2,000)
- ☐ Paid funeral bill

_____ _____

Signature Date

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