

IN THE COMMON PLEAS COURT OF ALLEN COUNTY, OHIO

PROBATE DIVISION
GENERAL ESTATE CHECKLIST

PLEASE NOTE: THIS CHECKLIST IS PROVIDED AS A GENERAL REFERENCE AND COURTESY. THIS LIST MAY NOT INCLUDE EVERY DOCUMENT NEEDED FOR THE COMPLETION OF AN ESTATE IN ALLEN COUNTY PROBATE COURT. IF YOU SEEK ADDITIONAL INFORMATION, PLEASE CONTACT AN ATTORNEY

Release from Administration

CASE INITIATION

- _____ Death Certificate
- _____ Decedent must have been a resident of Allen County at time of death
- _____ Full legal name of decedent ** includes full middle name and any possible A.K.A.'s the decedent had
- _____ Addresses including zip codes & phone numbers for Fiduciaries and Attorneys Security deposit for costs:
- _____ Release from Administration w/o will \$ 150
- _____ Release from Administration w/ will \$165
- _____ Application to Probate Will
- _____ Form 2.0 Original Last Will and Testament
- _____ Will must be signed & dated by testator and witnessed by two persons
- _____ All forms are signed by fiduciary and/or attorney (NO digital signatures)
- _____ Form 1.0 Surviving spouse, Next of Kin, Children, Legatees and Devises
- _____ (All beneficiaries named in Will must be listed on Page 2 of Form 1.0)
- _____ Form 2.3 Entry Admitting Will to Probate

BEFORE PRESENTING RELEASE PROCEEDINGS TO JUDGE

- _____ All parties listed on 1.0 must either:
 - 1.) receive Form 2.2 - Notice of Probate of Will
 - (If Notice of Probate of Will was issued, copy of Notice and signed certified mail card or print out from USPS to be filed (*SupR 59; CivR 73*))
 - OR
 - 2) sign Form 2.1- Waiver of Probate of Will
 - (Minors age 16 & 17 can not waive or have anyone waive for them, they MUST receive notice)
- _____ Form 2.4 Certificate of Service of Notice of Probate of Will
- _____ (To be filed not later than two months after the admission of the will to probate)

RELEASE PROCEEDINGS

- _____ Form 5.0 Application to Relieve Estate from Administration
- _____ Appropriate boxes need marked and must be within correct \$\$ ranges
- _____ Form 5.0E Entry setting hearing and ordering notice (needs marked to dispense with publication)
- _____ Form 5.1 and Liabilities (Cannot be insolvent. Assets must equal or be more than debts)
- _____ Verification of values for assets (including 3.0, Appr. Cert, etc. when applicable)
- _____ Form 1.0 Surviving spouse, Next of Kin, Children, Legatees and Devises
- _____ All parties listed on 1.0 **& creditors** must either:
 - 1.) receive Form 5.3 Notice of Application to Relieve Estate from Administration
 - (copy of Notice and signed certified mail card or print out from USPS to be filed)
 - OR
 - 2.) Sign Form 5.2 Waiver of Notice of Application to Relieve Estate from Administration
 - (Minors age 16 & 17 cannot waive/have anyone waive for them, they MUST receive notice)
- _____ Attorney Fee Application
- _____ Form 5.6 Entry Relieving Estate from Administration
- _____ Form 12.1 Certificate of Transfer (if applicable)
- _____ Authority to Transfer Motor Vehicle (if applicable)
- _____ Form 5.9 Report of Distribution
- _____ Must be filed within 60 days after Entry is approved, must be dated, and must match 5.6