

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**

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**CASE INITIATION**

- \_\_\_\_\_ Death Certificate
- \_\_\_\_\_ Decedent must have been a resident of Allen County at time of death
- \_\_\_\_\_ Full legal name of decedent
- \_\_\_\_\_ 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
- \_\_\_\_\_ Form 2.0 Application to Probate Will
- \_\_\_\_\_ 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 Deviseses  
(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 Deviseses  
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