

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*

Summary 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
- _____ Addresses including zip codes & phone numbers for Fiduciaries and Attorneys
- _____ Security deposit for costs:
 - Summary Release \$85
 - Summary Release with Real Estate \$94

If WILL also filed:

Application to file Will for Record Only

OR

- _____ 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 Devisees
 - _____ (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 SUMMARY RELEASE 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)

SUMMARY RELEASE PROCEEDINGS

- _____ Form 5.10 Application for Summary Release from Administration
 - Must list assets in correct places and have exact values and descriptions
 - Assets must be lesser of funeral expenses or \$5,000 (Spouse may also include \$40,000 family allowance)
- _____ Form 1.0 Surviving spouse, Next of Kin, Children, Legatees and Devisees
 - _____ Funeral Home Cost Verification
 - _____ Copy of funeral contract signed by both applicant and funeral director showing responsibility for payment
 - _____ OR
 - _____ Copy of funeral bill with proof of payment in applicant's name
 - _____ OR
 - _____ Copy of funeral bill and receipt paid by insurance policy and proof applicant is beneficiary of policy
 - _____ OR
 - _____ Proof of prepaid or preneed paid (if Spouse is applicant)
 - _____ Verification of Values (if applicable)
- _____ Form 12.0 Application for Certificate of Transfer (if applicable)
- _____ Form 12.1 Certificate of Transfer (if applicable) (not certified)
- _____ Form 5.11 Entry Granting Summary Release from Administration
 - _____ Certified Page listing filings and dates filed

** STAPLE PACKET TOGETHER WITH CERTIFIED PAGE ON THE BACK (Listed Items Only)**

- _____ Form 12.1 Additional Certificate of Transfer to file as Deed (Certified)