

**PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

NEW CASE INFORMATION STATEMENT

- THE UNDERSIGNED CERTIFIES THAT THE WILLS ON DEPOSIT HAVE BEEN EXAMINED AND NO LATER WILL WAS FOUND ON DEPOSIT FOR THIS DECEDENT.
- WILL DEPOSITED IN THIS COURT ON _____ IS HEREBY WITHDRAWN AND ATTACHED HERETO.

DEPUTY CLERK, PROBATE COURT

ATTORNEY OF RECORD TO COMPLETE THE FOLLOWING SECTION

THE UNDERSIGNED CERTIFIES THAT THIS CASE IS, IS NOT RELATED TO ANY CASE NOW PENDING IN ANY JUDICIAL SYSTEM.

CASE NUMBER OF RELATED CASE _____

DESCRIPTION AND JURISDICTION OF RELATED CASE _____

PLEASE CHECK ONE OF THE FOLLOWING:

- ESTATE OR RELIEF FILED HEREWITH WILL ONLY TAX ONLY REAL ESTATE ONLY
- ESTATE OR RELIEF EXPECTED TO BE FILED ON OR BEFORE _____
- OTHER _____

PLEASE CHECK ONE OF THE FOLLOWING REGARDING CITATION TO THE SURVIVING SPOUSE:

- DATE OF DEATH IS ON OR AFTER JANUARY 1, 2002, CITATION TO SURVIVING SPOUSE TO ISSUE

FOR DATES OF DEATH PRIOR TO JANUARY 1, 2002

- SPOUSE IS SOLE BENEFICIARY, CITATION IS UNNECESSARY
- SPOUSE IS NOT SOLE BENEFICIARY, PLEASE ISSUE A CITATION
- NO SURVIVING SPOUSE
- NO WILL FILED FOR PROBATE
- CITATION TO SPOUSE IS TO BE ISSUED AT REQUEST OF ATTORNEY OF RECORD

STATEMENT OF PERMANENT ADDRESS

The following address is my permanent address. I understand that I am required to notify the Court of any change in my address and that the Court is authorized to remove me if I fail to comply with this requirement.

Signature, Attorney of Record

Signature, Fiduciary

Print Attorney Name

Print Fiduciary Name

Address

Address

Phone Number

Phone Number

Ohio Supreme Court ID Number

**PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, 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, and 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, 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 is the next of kin entitled to the entire net proceeds of the estate and there is no will, therefore 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

 Typed or Printed Name

 Address

 Address

 Phone Number (include area code)

 Attorney Registration No. _____

 Applicant

 Typed or Printed Name

 Address

 Address

 Phone Number (include area code)

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.

ENTRY SETTING HEARING AND ORDERING NOTICE

The Court sets _____, at _____ o'clock _____. M., as the date and time for hearing the application for authority 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 to do so is equal or superior to that of applicant, and who have not waived appointment to administer the estate.

Date

Judge Jack R. Puffenberger

**PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, JUDGE**

CONSERVATORSHIP OF
 GUARDIANSHIP OF
 ESTATE OF
 MISCELLANEOUS INCOMPETENT
 TRUST OF _____, DECEASED

CASE NO. _____

RELEASE FOR RECORD CHECK ON PROPOSED FIDUCIARY

By my signature below, I hereby authorize the release of any and all records or information that your agency may have pertaining to me to the Probate Court of Lucas County, Ohio.

I further understand that my social security number, driver's license number and birthday listed on the attached sheet shall be used for conducting the record check and upon the conclusion of the record check that the attached sheet containing my social security number, driver license number and birth date shall be destroyed.

Date

Signature of Fiduciary/Applicant

Typed Name

CONCLUSION OF RECORD CHECK

_____ Records checked and found to be in order.
_____ Records checked and found not to be in order.
_____ Record Check Information Sheet destroyed.
_____ Record Check Information Sheet returned to attorney.

Date

Deputy Clerk

I, _____, Attorney at law hereby certify, that the within instrument was prepared and/or examined by me, and that the same, in my opinion, is correct and proper.

Attorney Ohio Supreme Court Number



RECORD CHECK
INFORMATION SHEET

Name: _____

Address:

Date of Birth: _____

Social Security Number: _____

Driver License Number: _____

PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, 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 that Attorney _____ agrees to be co-signor on all estate accounts and that estate assets will remain within Lucas County.

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

_____ Judge Jack R. Puffenberger

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.

[Seal]

_____ Probate Judge/Clerk

By _____

_____ Date

