

**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- WILL DEPOSITED IN THIS COURT ON \_\_\_\_\_ IS HEREBY WITHDRAWN AND ATTACHED HERETO.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

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**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 SUMMARY RELEASE FROM ADMINISTRATION**  
**[R.C. 2113.031]**

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

**[Check one of the following]**

- The applicant is decedent's surviving spouse entitled to one hundred percent of the allowance for support and decedent's funeral and burial expenses have been prepaid or the surviving spouse has paid or is obligated in writing to pay decedent's funeral and burial expenses and the value of the assets does not exceed the \$40,000 allowance for support under R.C. 2106.13(B) plus an amount not exceeding \$5,000 for decedent's funeral and burial expenses.
- The applicant, who is not the surviving spouse, has paid or is obligated in writing to pay decedent's funeral and burial expenses and the value of the assets is the lesser of \$5,000 or the amount of decedent's funeral and burial expenses.

Attached hereto is a receipt, contract or other document that confirms the applicants payment or obligation to pay decedent's funeral and burial expenses or if the applicant is the surviving spouse, the prepayment receipt, if applicable.

The decedent's surviving spouse, next of kin, legatees and devisees known to applicant, are listed on attached Form 1.0.

Applicant states that there are no pending proceedings for the administration of decedent's estate or relief of decedent's estate from administration under R.C. 2113.03.

All known assets with date of death values of the estate are as follows:

- Motor Vehicles (include year, make, model, body type, manufacturer's vehicle identification number and Certificate of Title number)  
\_\_\_\_\_  
\$ \_\_\_\_\_  
\_\_\_\_\_  
\$ \_\_\_\_\_



CASE NO. \_\_\_\_\_

Accounts maintained by a Financial Institution (include financial institution name and the account's complete identifying number:

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Stocks and bonds (include for each stock or bond its serial number, the name of its issuer, the name and address of its transfer agent, and the total number of shares of stock or bonds):

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Real estate described in accompanying Form 12.0 Application for Certificate of Transfer and Form 12.1 Certificate of Transfer and date of death value. [**Attach verification of value**].

\$ \_\_\_\_\_

Other assets and date of death values

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Total Assets \$ \_\_\_\_\_

Applicant requests an order granting summary release.

\_\_\_\_\_  
Attorney for Applicant

\_\_\_\_\_  
Applicant's Signature

\_\_\_\_\_  
Typed or Printed Name

\_\_\_\_\_  
Applicant's Typed or Printed Name

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City State Zip Code

\_\_\_\_\_  
City State Zip Code

\_\_\_\_\_  
Phone Number (include area code)

\_\_\_\_\_  
Phone Number (include area code)

Attorney Registration No. \_\_\_\_\_

Signed and acknowledged by the applicant in my presence this \_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Notary Public/Deputy Clerk





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

ESTATE OF \_\_\_\_\_, DECEASED

CASE NO. \_\_\_\_\_

**ENTRY GRANTING SUMMARY RELEASE FROM ADMINISTRATION**  
**[R.C. 2113.031]**

The Court finds that the application by \_\_\_\_\_, satisfies all requirements of R.C. 2113.031 and therefore summarily releases the estate from administration and directs:

- The delivery to the applicant of decedent's personal property set forth in the application with the title to that property.
  
- That Certificate(s) of Transfer, attached to the application, be issued.

A certified copy of this order together with a certified copy of the application for this order constitutes sufficient authority for a financial institution, corporation or other person referred to in division (A) to (F) of Section 5731.39 of the Revised Code or for a clerk of a Court of Common Pleas to transfer title to the applicant of an asset of the decedent's estate listed in the application.

This order eliminates the need for a financial institution, corporation, or other entity or person to be provided a written consent of the tax commissioner prior to the delivery, transfer, or payment to the applicant of an asset of the decedent's estate listed in the application.

This order eliminates the duty of all persons to file an Ohio Estate Tax Return exclusively for the assets listed in the application.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Judge Jack R. Puffenberger

