

# SHELBY COUNTY PROBATE COURT

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## ESTATE - SUMMARY RELEASE FROM ADMINISTRATION CHECKLIST (revised 06/07/16)

\_\_\_ **Form 2.0 – Application to Probate Will / \_\_\_ Entry Admitting Will to Probate**

\_\_\_ **Original Last Will and Testament**

\_\_\_ **Form 5.10 – Application for Summary Release from Administration** (RC 2113.031)

\_\_\_ Application must be notarized

\_\_\_ Assets should not exceed limits as provided for in the Application

\_\_\_ Copy of receipt/contract/other document confirming applicant's payment or obligation to pay funeral/burial expenses OR pre-payment receipt if surviving spouse, as provided for in application, to be attached to Application (*per Application*)

\_\_\_ The market value of **real property, including mobile homes, modular homes and manufactured homes** as found in the Shelby County Auditor's property records shall be accepted as the readily ascertainable value of the property and no further appraisal of such property shall be required... (*Local Rule 61.1(D)*)

\_\_\_ A copy of said evaluation shall be attached. (*Local Rule 61.1(D)*)

\_\_\_ The market value of any **motor vehicle, ATVs, motorcycles, personal watercraft, side cars, snowmobiles, trailers, utility vehicles, power boats, sailboats, personal watercraft, outboard motors, boat trailers, travel trailers/fifth wheels, motor homes, camping trailers, truck campers, and park models** as found in a current, nationally recognized used car guide, by determining the median value of the trade-in value and retail value may be adopted as the readily ascertainable value of the property and no further appraisal of such property shall be required... (*Local Rule 61.1(E)*)

\_\_\_ However, if the median value of the trade-in value and retail value are not available in the current, nationally recognized used car guide, then the Court will accept the retail value and it may be adopted as the readily ascertainable value of the property and no further appraisal of such property shall be required...

\_\_\_ A copy of the appropriate page(s) from said current nationally recognized used car guide shall be attached. (*Local Rule 61.1(E)*)

\_\_\_ **Form 1.0 – Surviving Spouse, Next of Kin, Children, Legatees and Devisees**

\_\_\_ **Form 5.11 – Entry Granting Summary Release from Administration**

\_\_\_ One of two boxes should be checked

\_\_\_ Security deposit for costs (Local Rule 58.1)

\_\_\_\_ Decedent must have been a resident of Shelby County, Ohio at time of death (RC 2113.01)

\_\_\_\_ Will should be signed by testator and witnessed by two persons (RC 2107.03)

\_\_\_\_ Beneficiaries named in Will should be listed on Page 2 of Form 1.0

\_\_\_\_ Signature of \_\_Applicant \_\_Fiduciary \_\_Attorney required (*SupR 57, CivR 11*)

\_\_\_\_ **Form 2.4 - Certificate of Service of Notice of Probate of Will**

\_\_\_\_ To be filed within two months of fiduciary's appointment, or if no fiduciary has been appointed, not later than two months after the admission of the will to probate (*SupR 59, ORC 2107.19*)

\_\_\_\_ Surviving spouse, persons who would be entitled to inherit under R.C. Chapter 2105 if testator had died intestate, and all legatees and devisees named in will **either** need to 1) receive **Form 2.2 - Notice of Probate of Will** AND/OR 2) sign **Form 2.1 – Waiver of Notice of Probate of Will** (*SupR 59, CivR 73*)

\_\_\_\_ **Form 7.0 – Certification of Notice to Administrator of Medicaid Estate Recovery Program** (if applicable)

\_\_\_\_ **OTHER** \_\_\_\_\_

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