

**GEAUGA COUNTY PROBATE COURT  
JUDGE TIMOTHY J. GRENDALL**

**CHECKLIST - SAFE DEPOSIT BOX**

These instructions are provided as a public service of the Geauga County Probate Court, are intended as a guideline only, and are not legal advice. Depending on the circumstances of each case, additional steps may be required that are not listed below. The clerks are not attorneys and therefore cannot answer legal questions or assist you in completing the forms or deciding which forms apply to your situation. The documents that you file must be typewritten or legibly handwritten, and completed in their entirety. The clerks may refuse for filing illegible or incomplete documents.

**Filing Requirements**

- **Form 1.0 Surviving Spouse, Children, Next of Kin, Legatees and Devisees**
- **GC PF 41.0 - Application for Appointment of Commissioner to Report on the Contents of a Safe Deposit Box**
- **Copy of Death Certificate** - (1) must redact the social security number and (2) must be shrunk to letter-size.
- **GC PF 41.1 - Judgment Entry-Appointing Commissioner To Inventory Safe Deposit Box**
- **Court Cost Deposit** - arrange for payment of court cost deposit. See the “Probate Court Costs” on the Court’s website.
- **Identification** - [if applicant is not represented by an attorney - see Geauga Probate Local Rule 78.10] (1) a government-issued photographic identification (e.g. a current driver’s license or passport), and (2) evidence of current mailing address (e.g. recent utility bill, bank statement account, property tax bill, voter registration card).
- **GC PF 41.3 – Inventory of Contents of Safe Deposit Box** (do not file with clerk at the initial filing, but rather deliver it to bank employee upon the opening of the safe deposit box – see below)

**Additional Notes**

- Promptly after the Commissioner receives by mail the signed Judgment Entry-Appointing Commissioner To Inventory Safe Deposit Box (Form GC PF 41.1), the Commissioner shall (A) promptly contact the bank, arrange for a date to open the safe deposit box, and (B) deliver to the bank employee (i) a copy of that judgment entry, (ii) a copy of the letters of appointment if the Commissioner has been appointed as executor or administrator of the estate, and (iii) form “GC PF 41.3 – Inventory of Contents of the Safe Deposit Box” . That judgment entry will set forth the latest date for filing the completed and signed form “GC PF 41.3 - Inventory of Contents of the Safe Deposit Box.”
- Upon completion of the inspection of the safe deposit box and preparation of form “GC PF 41.3 – Inventory of Contents of the Safe Deposit Box,” both the Commissioner and the bank employee shall sign form GC PF 41.3 “GC PF 41.3 – Inventory of Contents of the Safe Deposit Box.” The Commissioner shall take possession of any Wills or codicils found in the safe deposit box and promptly file with the Clerk form “GC PF 41.3 – Inventory of Contents of the Safe Deposit Box.”