

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

**CHECKLIST - ANCILLARY ADMINISTRATION**

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. The Court recommends that you obtain legal advice from your attorney or obtain assistance from the Court's Help Center before preparing and filing any forms. You may make an appointment with the Help Center by calling 440-226-7339. If you decide to proceed without assistance from your attorney or from the Court's Help Center, then you should read the Probate Information Sheet "Ancillary Administration."

**Initial Considerations**

1. Will Admitted to Probate in Domiciliary State. If the Decedent's Will was admitted to probate in the Domiciliary State and the applicant was appointed the executor, then the applicant must obtain from the Domiciliary Court and file with this Court two documents:
  - a. Authenticate Copy of the Will
    - i. Prepare GC PF 42.0 "Application to Admit to Record Authenticated Copy of Foreign Will"
  - b. Exemplified Copy of Domiciliary Court Record that shows granting "letter of authority" to the applicant as fiduciary appointed by the Domiciliary Court.
    - i. Prepare GC PF 42.4 "Application to Admit Foreign Records"
2. Determine Ohio Assets and Liabilities. Determine the Ohio assets and liabilities of the Decedent.

**Filing Requirements**

1. **Copy of Death Certificate** - (1) must redact the social security number and (2) must be shrunk to letter-size.
2. **GC PF 42.0 - Application to Admit to Record Authenticated Copy of Foreign Will** - If Decedent had a Will that was admitted to probate by Domiciliary Court, together with authenticated copy of the Will. If Decedent had a Will that was not admitted to probate, then see checklist "Probating Decedent's Will."
3. **GC PF 42.4 - Application to Admit Foreign Records** - submit with that form the Exemplified Copy of Domiciliary Court Records that shows granting "letter of authority" to the applicant as fiduciary appointed by the Domiciliary Court.

3. **Form 1.0 Surviving Spouse, Children, Next of Kin, Legatees and Devisees** (no need to insert information on page 2 regarding beneficiaries if the Decedent died without a valid Will)
4. **Form 4.0 Application for Authority to Administer Estate**
5. **Form 4.1 Supplemental Application for Ancillary Administration**
6. **Form 4.8 Fiduciary's Acceptance**
7. **GC PF 4.30 - Background Certification and Records Check** – if not represented by an attorney

### **Additional Notes**

- Bond Requirement. Consider the Bond requirement and file either (1) 4.2 – Fiduciary's Bond, or (2) Form GC PF 4.40 – Application to Dispense with Fiduciary's Bond, or (3) Form GC PF 4.37 – Consent to Dispense with Fiduciary's Bond, together with Form GC PF 4.38 – Fiduciary's Acknowledgment of Personal Liability.
- See R.C. §2129.15. Within five months after appointment (i) prepare and file with the Court form GC PF 42.3A - Certificate of Assets and Liabilities, (ii) serve a copy of that certificate upon all Interested Persons, and (iii) prepare and file with the Court GC PF 42.3B - Proof of Service of Certificate of Assets and Liabilities.
- Preparation of Form 1.0. If there is a surviving spouse or surviving lineal descendants, then include (i) the name and address of each predeceased child, and (ii) under the name of a predeceased child insert the name and address of that child's lineal descendants. Moreover, you must correctly check one of the boxes toward the bottom of the front page of Form 1.0. Carefully review Geauga Probate Local Rule 78.5(A)(2).
- Review Checklist - Full Administration.