

**PROBATE COURT OF GEAUGA COUNTY, OHIO
JUDGE TIMOTHY J. GRENDALL**

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION TO RELEASE FINANCIAL INFORMATION

Applicant states that _____ ("Decedent") died _____, 20__.

Decedent's residence was _____
(Street Address)

(City, Village, or Township) (County) (State) (Zip Code)

Applicant requests authority to obtain, from the financial institutions named below, only the following information regarding Decedent's (1) financial accounts: (a) the manner in which each of the accounts for the Decedent are titled, (b) the last four digits of the account number, and (c) the date of death value of the accounts; and (2) death benefits (e.g., life insurance, annuities, retirement accounts/plans): (a) the date of death value of the death benefit, and (b) the last four digits of the applicable policy/account number. Applicant makes this request for the sole purpose of pursuing an estate administration and states that no estate administration regarding the Decedent has been commenced. Attached is (i) Form 1.0 - "Surviving Spouse, Children, Next of Kin, Legatees and Devisees," (ii) Form GC PF 4.14 - "Waiver and Consent to Release Financial Information, and (iii) a copy of Decedent's death certificate. Applicant states that Applicant is either (1) an individual who is eligible to be appointed as a fiduciary of the Decedent's estate under Ohio law, or (2) all persons listed on Form 1.0 have consented to the appointment, and the Applicant submits to the court a valid government-issued photo identification.

Financial Institution

Address

Signature - Attorney for Applicant

Signature - Applicant

Type or print name

Type or print name

Street Address

Street Address

City State Zip

City State Zip

Phone Number (include area code)

Phone number (include area code)

Attorney Registration No. _____

Judgment Entry Magistrate's Decision

The Court, having considered this Application to Release Financial,

The Court finds that the Application is well taken and the appointment of the applicant as special commissioner to obtain certain of Decedent's financial information for the sole purpose of evaluating whether to file an application to administer Decedent's estate, a release of administration, or a summary release of administration is in the best interest of the Decedent's creditors, surviving spouse, beneficiaries, and next-of-kin.

The Court Orders That:

1. _____ ("Special Commissioner") is appointed to obtain certain of Decedent's financial information for the sole purpose of evaluating whether to file an application to administer Decedent's estate, a release of administration, or a summary release of administration.
2. Upon written request of the Special Commissioner, those financial institutions identified in the application are authorized to and shall promptly release and deliver to the Special Commissioner (1) a description of each financial asset, account, policy, contract titled in the Decedent's name and the manner of ownership, (2) the last four digits of the identification number for each of those assets, and (3) the date of death value of each of those assets.
3. The Special Commissioner shall (i) store such information in a safe and secure manner, (ii) maintain the confidentiality of such records, (iii) act in a fiduciary manner regarding Decedent's beneficiaries and next-of-kin, (iv) not disclose or otherwise distribute such information to any person or entity, excepting the attorney who signed the application or as otherwise required by applicable law or order of this Court, and (v) file a report of findings with the Court using Form CG PF - "4.13A - Report of Finding of Financial Information" no later than 30 Calendar Days after receipt of the financial information.

The Court denies this application.

Dated: _____

Judge / Magistrate