

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

ESTATE OF _____, DECEASED

CASE NO. _____

INVENTORY AND APPRAISAL

[R.C. 2115.02 and 2115.09] – Date of Death After April 5, 2017

To the knowledge of the fiduciary the attached schedule of assets in decedent's estate is complete. The fiduciary determined the value of those assets whose values were readily ascertainable and which were not appraised by the appraiser, and that such values are correct.

The estate is recapitulated as follows:

Tangible personal property.....\$ _____
Intangible personal property.....\$ _____
Real property.....\$ _____
Total.....\$ _____

Automobiles transferred to surviving spouse under R.C. 2106.18

Value(s): \$ _____, \$ _____, \$ _____, \$ _____,
\$ _____, \$ _____, \$ _____, \$ _____

Total value [not to exceed \$65,000.00]..... \$ _____

The fiduciary is also the surviving spouse of the decedent and waives notice of the taking of the inventory.

Attorney

Fiduciary

Attorney Registration No. _____

APPRAISER'S CERTIFICATE

The undersigned appraiser agreed to act as appraiser of decedent's estate and to appraise the property exhibited truly, honestly, impartially, and to the best of the appraiser's knowledge and ability. The appraiser further says that those assets whose values were not readily ascertainable are indicated on the attached schedule by a check in the "Appraised" column opposite each such item, and that such values are correct.

Appraiser

CASE NO. _____

WAIVER OF NOTICE OF TAKING OF INVENTORY
[R.C. 2115.04]

The undersigned surviving spouse hereby waives notice of the time and place of taking the inventory of decedent's estate.

Surviving Spouse

WAIVER OF NOTICE OF HEARING ON INVENTORY
[Use when notice is required by the Court or deemed necessary by the fiduciary]

The undersigned, who are interested in the estate, waive notice of the hearing on the inventory.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

ENTRY SETTING HEARING

The Court sets _____ at _____ o'clock _____M., as the date and time for hearing the inventory of decedent's estate.

Date

Judge / Magistrate

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

ESTATE OF _____ . DECEASED
CASE NO. _____

SCHEDULE OF ASSETS

[Attach to inventory and appraisal]

Page _____ of _____ pages.

(Insert a check in the column "Appraised" opposite an item if it was valued by the appraiser. Leave blank if the **readily ascertainable** value was determined by fiduciary)

Item	Appraised	Value
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
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_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____

Item	Appraised	Value
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
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_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	\$ _____

Fiduciary

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

ESTATE OF _____ . DECEASED

CASE NO. _____

WAIVER OF NOTICE OF HEARING ON INVENTORY
[Use when notice is required by the Court or deemed necessary by the fiduciary]

The undersigned, who are interested in the estate, waive notice of the hearing on the inventory.

Signature

Type Name

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**PROBATE COURT OF GEAUGA COUNTY, OHIO
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ESTATE OF _____, DECEASED

CASE NO. _____

PROOF OF SERVICE OF NOTICE OF HEARING ON INVENTORY

(For dates of death on or after June 23, 1994)

The undersigned states that all persons required to receive notice as provided in R.C. §2115.16 have received notice of hearing on the inventory or have waived notice of hearing on the inventory.

The waivers or evidence of notification are attached as required by Civil Rule 73(F) or have been previously filed.

[type name]

Fiduciary

Attorney for Fiduciary - Registration No. _____

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

ESTATE OF _____, DECEASED

CASE NO. _____

NOTICE OF HEARING ON INVENTORY
[R.C. §2115.16]

To: _____

You are notified that the inventory of decedent's assets has been filed and the hearing on the inventory will be held on _____, 20 ____, at ____ o'clock __M. The Court is located at Geauga County Courthouse Annex, 231 Main Street, Suite 200, Chardon, Ohio 44024.

Exceptions to the inventory must be filed in writing not less than five days before the hearing.

Type Name

Fiduciary
Attorney
Attorney Registration No. _____

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

IN THE MATTER OF _____

CASE NO. _____

**CONFIDENTIAL DISCLOSURE OF PERSONAL IDENTIFIERS
[Rule 45(D) of the Rules of Superintendence for the Courts of Ohio]**

Complete Personal Identifier	Institution	Abbreviation	Form No.	Filing Date
Ex. 123-45-6789	Social Security	6789	22.3	7/1/2019
Ex. 0001234567	Anytown Bank Checking	Anytown #1	6.1	7/1/2019
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____
6. _____	_____	_____	_____	_____
7. _____	_____	_____	_____	_____
8. _____	_____	_____	_____	_____
9. _____	_____	_____	_____	_____
10. _____	_____	_____	_____	_____

Check if additional pages are attached

Signature of Filing Party

Printed Name

Date: _____

This is page _____ of _____ pages

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

ESTATE OF _____, DECEASED

CASE NO. _____

DIGITAL ASSET CERTIFICATION

I certify that (1) I have made a good faith effort to ascertain the Digital Assets owned by _____ (the "Decedent") and the value, and (2) the following is true and correct to the best of my knowledge:

The Decedent owns equipment capable of storing "electronic records" [see R.C. 2137.01(J) and (U) – e.g. computer, external hard drive, tablet, iPOD, cellphone, flash-drive, backup equipment, CD, DVD, etc.] Yes No

The aggregate value of Decedent's Digital Assets is greater than \$5,000 Yes No

The Decedent owns or leases the following Digital Assets (as defined by R.C. 2137.01):

- 1. Photos, Video, Music Yes No
- 2. Computer programs – Microsoft Windows, etc. Yes No
- 3. Gaming Software Yes No
- 4. Cryptocurrency – e.g. Bitcoin, Ethereum, etc. Yes No
- 5. Loyalty Programs – e.g. credit card usage, airline accounts, etc. Yes No
- 6. Domain Names Yes No
- 7. Website Accounts – e.g. Amazon, eBay, Goggle, PayPal, etc. Yes No
- 8. Social Media Accounts – e.g. Facebook, Linkedin, Twitter, YouTube, Instagram, Reddit, Tumbler, etc. Yes No
- 9. Other Digital Assets (see R.C. 2137.01(l)) Yes No
If so, please explain:

I have fully informed (i) the surviving spouse, if any, (ii) all adult next of kin or beneficiaries of this probate estate, and (iii) the guardian of all minor next of kin or beneficiaries of this probate estate of the description, extent, and value of all Digital Assets known by me to be owned by the decedent at date of death. Yes No

Date: _____

Print Name

PROBATE COURT OF GEAUGA COUNTY, OHIO

JUDGE TIMOTHY J. GRENDALL

ESTATE OF _____, DECEASED

CASE NO. _____

TANGIBLE PERSONAL PROPERTY CERTIFICATION

I certify that (1) I have made a good faith effort to ascertain the tangible personal property owned by _____ (the "Decedent") at death, and (2) the following is true and correct to the best of my knowledge as of the date of death:

- 1. Decedent owned household goods and clothing that, in the aggregate, have a value in excess of \$5,000. Yes No
- 2. Decedent owned one or more items of jewelry that individually have a value in excess of \$2,000. Yes No
- 3. Decedent owned one or more items of artwork that, individually have a value in excess of \$2,000. Yes No
- 4. Decedent owned one or more collections that, in the aggregate, have a value in excess of \$2,000 - e.g., coins, stamps, baseball cards, etc. Yes No
- 5. Decedent owned precious metals that, in the aggregate, have a value in excess of \$2,000 – e.g., gold, silver, etc. Yes No
- 6. Decedent owned business tangible personal property that, in the aggregate, has a value in excess of \$2,000 – e.g., tools, inventory, supplies, computers, etc. Yes No
- 7. Decedent owned or possessed one or more firearms that are regulated by federal law or applicable state law or any Dangerous ordnance as defined in R.C. Sec. 2923.11(K). Yes [] No []

To the extent possible, I have fully informed (i) the surviving spouse, if any, (ii) all adult next of kin or beneficiaries of this probate estate, and (iii) the guardian of all minor next of kin or beneficiaries of this probate estate of the description, extent, and value of all tangible personal property known by me to be owned by the decedent at date of death.

Yes No

Dated : _____

Print Name

PROBATE COURT OF GEauga COUNTY, OHIO
JUDGE TIMOTHY J. GRENDALL

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION FOR ORDER DISPENSING WITH APPRAISAL

The applicant requests that an appraisal of the following probate property be dispensed with: (Check appropriate boxes)

- Real Property, where value is determined in accordance with Geauga County Probate Local Rule 78.5(D)(1)(a)(2)(a) and evidence is provided.
- Vehicles, where value is determined in accordance with Geauga County Probate Local Rule 78.5(D)(1)(a)(2)(b) and evidence is provided.
- Tangible Personal Property, where value is determined in accordance with Geauga County Probate Local Rule 78.5(D)(1)(a)(2)(c) and the total value is equal to or greater than \$5,000.
- Digital Assets, where value is determined in accordance with Geauga County Probate Local Rule 78.5(D)(1)(a)(2)(c) and the total value is less than \$5,000.
- Other:

Attorney Name

Street Address

City, State, Zip

Telephone

Atty Reg. No. _____

Fiduciary Name

Street Address

City, State, Zip

Telephone

APPLICATION FOR ORDER DISPENSING WITH APPRAISAL

Entry Magistrate's Order - Dispensing with Appraisal

IT IS THE ORDER OF THIS COURT that the fiduciary may file an inventory release from administration summary release from administration without an appraisal within 30 days.

IT IS THE ORDER OF THIS COURT that the fiduciary may file an inventory release from administration summary release from administration without an appraisal within 30 days, except as provided below.

Date: _____

Judge / Magistrate

CONSENT TO DISPENSING WITH APPRAISEMENT

The undersigned consent to dispensing with the appraisal of probate assets as set forth in the Application for Order Dispensing with Appraisement.

Signature

Print Name

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____