

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

ESTATE OF _____, DECEASED

Case No. _____

**SURVIVING SPOUSE, CHILDREN, NEXT OF KIN,
 LEGATEES AND DEVISEES**

[R.C. 2105.06, 2106.13 and 2107.19]

**[Use with those applications or filings requiring some or all of the
 information in this form, for notice or other purposes. Update as required]**

The following are decedent's known surviving spouse, children, and the lineal descendants of deceased children, if none, the following are decedent's next of kin who are or would be entitled to inherit under the statutes of descent and distribution.

Name	Residence Address	Relationship to Decedent	Birth date of Minor
_____	_____	Surviving Spouse	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

NOTICE - The Clerk will not accept for filing this Form 1.0 if (i) a surviving spouse and at least one lineal descendant or a minor child of decedent is listed above and (ii) one of the following boxes is NOT checked.

[Check whichever of the following is applicable]

- The surviving spouse is the natural or adoptive parent of all of the decedent's children.
- The surviving spouse is the natural or adoptive parent of at least one, but not all, of the decedent's children.
- The surviving spouse is not the natural or adoptive parent of any of the decedent's children.
- There are minor children of the decedent who are not the children of the surviving spouse.
- There are minor children of the decedent and no surviving spouse.

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

ESTATE OF _____, DECEASED
CASE NO. _____

APPLICATION FOR SUMMARY RELEASE FROM ADMINISTRATION
[R.C. 2113.031]

Applicant states that decedent died on _____

Decedent's domicile was _____
Street Address

City or Village, or Township if unincorporated area County

Post Office State Zip Code

[Check one of the following]

- The applicant is decedent's surviving spouse entitled to one hundred percent of the allowance for support and decedent's funeral and burial expenses have been prepaid or the surviving spouse has paid or is obligated in writing to pay decedent's funeral and burial expenses and the value of the assets does not exceed the \$40,000 allowance for support under R.C. 2106.13(B) plus an amount not exceeding \$5,000 for decedent's funeral and burial expenses.
- The applicant, who is not the surviving spouse, has paid or is obligated in writing to pay decedent's funeral and burial expenses and the value of the assets is the lesser of \$5,000 or the amount of decedent's funeral and burial expenses.

Attached hereto is a receipt, contract or other document that confirms the applicant's payment or obligation to pay decedent's funeral and burial expenses or if the applicant is the surviving spouse, the prepayment receipt, if applicable.

The decedent's surviving spouse, next of kin, legatees and devisees known to applicant, are listed on attached Form 1.0.

Applicant states that there are no pending proceedings for the administration of decedent's estate or relief of decedent's estate from administration under R.C. 2113.03.

All known assets with date of death values of the estate are as follows:

- Motor Vehicles (include year, make, model, body type, manufacturer's vehicle identification number and Certificate of Title number)

_____ \$ _____

_____ \$ _____

[] Accounts maintained by a Financial Institution (include financial institution name and the account's complete identifying number):

_____ \$
_____ \$

[] Stocks and Bonds (include for each stock or bond its serial number, the name of its issuer, the name and address of its transfer agent, and the total number of shares of stocks or bonds):

_____ \$
_____ \$

[] Real estate described in accompanying Form 12.0 Application for Certificate of Transfer and Form 12.1 Certificate of Transfer and date of death value. [**Attach verification of value.**] \$ _____

[] Other assets and date of death values

_____ \$
_____ \$

Total Assets \$ _____

Applicant requests an order granting summary release.

Attorney for Applicant

Typed or Printed Name

Street Address

City State Zip Code

Phone Number (include area code)

Attorney Registration No. _____

Applicant's Signature

Applicant's Typed or Printed Name

Street Address

City State Zip Code

Phone Number (include area code)

Signed and acknowledge by the applicant in my presence this _____ day of _____, _____.

Notary Public/Deputy Clerk

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

ESTATE OF _____, DECEASED

Case No. _____

MAGISTRATE'S DECISION GRANTING SUMMARY RELEASE FROM ADMINISTRATION

JUDGMENT ENTRY GRANTING SUMMARY RELEASE FROM ADMINISTRATION

[R.C 2113.031]

The Court finds that the application by _____, satisfies all requirements of R.C. 2113.031 and therefore summarily releases the estate from administration and directs:

- The delivery to the applicant of decedent's personal property set forth in the application with the title to that property.
- That Certificate(s) of Transfer, attached to the application, be issued.

A certified copy of this order together with a certified copy of the application for this order constitutes sufficient authority for a financial institution, corporation or other entity or person referred to in division (A) to (F) of Section 5731.39 of the Revised Code or for a clerk of a Court of Common Pleas to transfer title to the applicant of an asset of the decedent's estate listed in the application.

This order eliminates the need for a financial institution, corporation, or other entity or person to be provided a written consent of the tax commissioner prior to the delivery, transfer, or payment to the applicant of an asset of the decedent's estate listed in the application.

This order eliminates the duty of all persons to file an Ohio Estate Tax Return exclusively for the assets listed in the application.

Date

Judge / Magistrate

NOTICE: Pursuant to Civ. R. 53(D)(3)(a), a party may file written objections to the Magistrate's Decision within 14 days of filing of the decision. A party shall not assign as error on appeal the Court's adoption of any factual findings or legal conclusion, whether or not specifically designated as a finding of fact or conclusion of law under Civ. R. (D) (3)(a)(ii), unless the party timely and specifically objects to that factual finding or legal conclusion as required by Civ. R. 53(D)(3)(b).

JUDGMENT ENTRY ADOPTING MAGISTRATE'S DECISION

The Court, upon independent review of the record, finds the Magistrate's Decision to be well taken. The Court has reviewed the Decision for any errors pursuant to Civ. Rule 53 and hereby adopts the Magistrate's Decision as an Order of this Court. The Magistrate's Decision is hereby incorporated into the Entry by reference.

Date

Judge Timothy J. Grendell

NOTICE OF FINAL APPEALABLE ORDER

You are hereby notified that this may be a final appealable order.

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. _____

MEDICAID RECOVERY ACKNOWLEDGMENT

[R.C. § 2117.061]

As the person responsible for this estate (executor, administrator, commissioner, or the person who filed for a Release or Summary Release), I acknowledge that it is my duty to ascertain within 30 days after filing the initial application of appointment whether the decedent was:

- (1) 55 years of age or over on the date of death; and
- (2) recipient of medical assistance (Medicaid) benefits under R.C Chapter 5162.

I further acknowledge that *if the answer to both of those determinations is "yes"*, then I have a further duty to determine whether I must prepare SC Form 7.0(A) - "Notice of Administrator of Medicaid Estate Recovery Program," and timely mail that notice to the Medicaid Recovery Administrator at:

Administrator, Medicaid Estate Recovery
30 E. Broad St., 14th Floor
Columbus, OH 43215

After mailing that Notice of Administrator of Medicaid Estate Recovery Program, I will promptly file with the Court SC Form 7.0 - "Certification of Notice to Administrator of Medicaid Estate Recovery Program.

Print Full Name

**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. _____

Surviving Spouse Selection of Automobile
[R.C. §2106.13 and R.C. §2106.18]

I, _____, certify that I am the surviving spouse of
_____ (the "Decedent").

Select one of the following:

- I have not and will not exercise my right to select an automobile owned by the Decedent, as permitted under R.C. §2106.18.
- I have exercised my right to select an automobile owned by the Decedent, as permitted under R.C. §2106.18, described as follows (as to automobile description, provide year, make, model, and body type, and as to value, provide the value set forth in the affidavit of value required by R.C. §4505.10(B)):

Note: Automobile includes a motorcycle and truck for person use - See R.C. 2106.18(D)

Automobile Description	Value
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Dated: _____

Print Name of Surviving Spouse

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

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