

# SHELBY COUNTY PROBATE COURT

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## ESTATE CHECKLIST - NEW SHORT FORM RELEASE OF ADMINISTRATION

\_\_\_ **Form 2.0** – Application to Probate Will / \_\_\_ Entry Admitting Will to Probate

\_\_\_ **Original Last Will and Testament**

\_\_\_ **Form 5.0A (Form 5.12 on website)** – Application for Short Form Release of Administration (*RC 2113.03, Local Rule 75.3*)

\_\_\_ Assets cannot not exceed total permitted by local Rule (*Local Rule 75.3*)

\_\_\_ Funeral expenses paid (*RC 2117.25(B), Local Rule 75.3*)

\_\_\_ **Form 1.0** – Surviving Spouse, Next of Kin, Children, Legatees and Devisees

\_\_\_ **Form 5.0A (Form 5.12 on website)** – Order

\_\_\_ Applicable paragraphs to be marked and completed by Applicant

\_\_\_ Security deposit for costs (*Local Rule 58.1*)

\_\_\_ Decedent died a resident of Shelby County (*RC 2113.01*)

\_\_\_ Will signed by testator and witnessed by two persons (*RC 2107.03*)

\_\_\_ Beneficiaries named in Will listed on Page 2 of Form 1.0

\_\_\_ Signature of \_\_\_Applicant \_\_\_Fiduciary \_\_\_Attorney required (*SupR 57, CivR 11*)

\_\_\_ **Form 2.4 - Certificate of Service of Notice of Probate of Will**

\_\_\_ To be filed within two months of fiduciary's appointment, or if no fiduciary has been appointed, not later than two months after the admission of the will to probate (*SupR 59, ORC 2107.19*)

\_\_\_ Next of kin and beneficiaries to receive Notice (Form 2.2) or Waive (Form 2.1) Notice; appropriate boxes to be checked; copy of notices and signed certified mail cards and/or waivers to be attached (*SupR 59, CivR 73*)

\_\_\_ **Form 7.0 – Notice to Administrator of Estate Recovery Program** (if decedent was fifty-five (55) years of age or older at the time of death and has been determined to have been a recipient of medical assistance)

\_\_\_ **OTHER** \_\_\_\_\_  
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