

# SHELBY COUNTY PROBATE COURT

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## ESTATE CHECKLIST - NEW SUMMARY RELEASE FROM ADMINISTRATION

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

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

\_\_\_ **Form 5.10** – Application for Summary Release from Administration (*RC 2113.031*)

\_\_\_ Assets should not exceed limits as provided for in application

\_\_\_ Receipt/contract/other document confirming applicant's payment or obligation to pay funeral/burial expenses OR pre-payment receipt if surviving spouse, as provided for in application

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

\_\_\_ **Form 5.11** – Entry Granting Summary Release from Administration

\_\_\_ One of two boxes should be checked

\_\_\_ 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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