

**PROBATE COURT OF SHELBY COUNTY, OHIO**

**TRUST OF** \_\_\_\_\_

**FOR THE BENEFIT OF** \_\_\_\_\_

**CASE NO.** \_\_\_\_\_

**FIDUCIARY’S ACCEPTANCE (TRUSTEE)**

I, the undersigned, hereby accept the duties which are required of me by law, and such additional duties as are ordered by the Court having jurisdiction of the subject matter of the trust, as testamentary trustee.

Making and filing an inventory of the real and personal property contained in the trust within three months after appointment.

Administering the trust estate in accordance with law and the Will of testator.

Depositing funds which come into my hands in a lawful depository located within this state.

Investing surplus funds in a lawful manner.

Making and filing an account at least once each year, or each two years if permitted by an order of this Court.

Filing a final account within thirty days after the trusteeship is terminated.

I acknowledge that I am subject to removal as such fiduciary if I fail to perform such duties.

I also acknowledge that I am subject to possible penalties for improper conversion of the property which I hold as fiduciary.

\_\_\_\_\_  
Fiduciary

NOTE: Sec. 2109.02. Every fiduciary, before entering upon the execution of a trust, shall receive letters of appointment from a probate court having jurisdiction of the subject matter of the trust.

The duties of a fiduciary shall be those required by law, and such additional duties as the court orders. Letters of appointment shall not issue until a fiduciary has executed a written acceptance of his duties, acknowledging that he is subject to removal for failure to perform his duties, and that he is subject to possible penalties for conversion of property he holds as a fiduciary. The written acceptance may be filed with the application for appointment.