

PROBATE COURT OF WHATEVER COUNTY, OHIO

Additional room here for extra long name

ESTATE OF Full name of decedent

CASE NO. D case number

CHECKLIST FOR THE ADMINISTRATION OF AN ESTATE

This checklist is intended as a guideline **only** and should not be relied upon as a comprehensive list of fiduciary duties in the administration of a decedent's estate.

| Procedural Steps | Statutory Time Limit | Target Date | Date Completed |
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| 1. Surviving Spouse, Next of Kin, Legatees and Devisees [R.C. 2105.06] Form 1.0 | Filed when opening estate | | |
| 2. Classification Form for Estates Form 1.01 | Filed when opening estate | | |
| Application to Probate Will [R.C. 2107.11, 2107.18, 2107.19] Form 2.0 (Note: If no Will, proceed to Step 2.) | Filed when opening estate and presenting Will | | |
| Entry Admitting Will to Probate [R.C. 2107.18] Form 2.3 (Not needed in every county) | Presented with 2.0 | | |
| Waiver of Notice of Probate of Will [R.C. 2107.19 (A)(2)(3)(4)] Form 2.0 or 2.1 | Can be presented with 2.0 or anytime within two months of the appointment of the Fiduciary | | |
| Notice of Probate of Will [R.C. 2107.19(A)(1)] Form 2.2 | Within two weeks after Will is admitted | | |
| Certificate of Service of Notice of Probate of Will [R.C. 2107.19(A)(3)] Form 2.4 | After all return receipts on certified mail notice of probate or waivers have been filed with the court but within two months of the appointment of Fiduciary | | |
| Election of Spouse [R.C. 2106.01] Form 8.1 or 8.2 | Within five months of appointment of Fiduciary | | |
| Will Contest [R.C. 2107.71, 2107.76] | Within three months of filing of 2.4 | | |
| 3. Application for Authority to Administer Estate [R.C. 2109.02, 2113.07] Form 4.0 | Typically filed at the same time as 2.0 but can be filed after probate of Will. If there is no Will, it can be filed any time after death. | | |

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| Waiver of Right to Administer Estate [R.C. 2113.07] Form 4.3 (Needed only if person applying for authority to administer estate is not named in the Will or if there is no Will) | This should be filed with the 4.0 or before the appointment of the Fiduciary. |
| Notice of Hearing on Appointment of Fiduciary Form 4.4 | Must be given before appointment of Fiduciary (only to those who have not waived notice) |
| Fiduciary's Bond [R.C. 2109.04, 2109.07, 2109.09] Form 4.2 | Before appointment of Fiduciary if not dispensed with by Will; typically presented with 4.0 |
| Fiduciary's Acceptance Form H.C. 4.8 | Typically presented with 4.0 but anytime before inventory is filed. |
| Entry Appointing Fiduciary; Letters of Authority. [R.C. 2113.05, 2113.06] Form 4.5 | Presented with 4.0. It is approved upon posting of bond, if required. Otherwise, after all notice has been given or waivers are filed. |
| 4. Appointment of Appraiser [R.C. 2115.06] Form H.C. 3.0 | Any time prior to preparation of inventory; can be filed with the inventory. |
| 5. Inventory and Appraisal, Schedule of Assets [R.C. 2115.02] Forms 6.0, 6.1 | Within three months of appointment of Fiduciary, unless extension granted by Court |
| Entry Setting Hearing on Inventory [R.C. 2115.16] Form H.C. 6.4 | Presented with 6.0. The hearing will be set not later than one month after filing of inventory. |
| Waiver of Notice of Hearing on Inventory [R.C. 2115.16] Form 6.2 or back of 6.0 | Can be filed with 6.0; must be filed before the hearing on the inventory |
| Notice of Hearing on Inventory [R.C. 2115.16] Form 6.3 | Served by certified mail on all parties ordered by Court not less than five days of hearing, unless waived, but is not required in all counties |
| Notice to Surviving Spouse of Taking of Inventory [R.C. 2115.04] (Waiver of Notice on back of 6.0) | Not less than five days before making of inventory |
| Exceptions to Inventory [R.C. 2115.16] | May be filed at any time prior to five days before hearing on inventory |
| Hearing on Exceptions to Inventory [R.C. 2115.16] | As set by court |
| Entry Approving Inventory [R.C. 2115.16] Form H.C. 6.5 | Presented with 6.0 but will not be entered until after hearing on inventory |
| Report of Newly Discovered Assets [R.C. 2113.69] | Within thirty days of receipt of such assets |

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| 6. Collect Assets and Complete Administration of Estate [R.C. 2113.25] | Within thirteen months of appointment of Fiduciary |
| 7. Election of the Surviving Spouse to Purchase Property [R.C. 2106.16] | After the filing of the inventory but not later than one month after the approval of the inventory |
| 7.A Election of Surviving Spouse to Receive Mansion House [R.C. 2106.10] Form H.C. 108.4 | At or before final account or prior to Entry Relieving Estate from Administration |
| 8. Application to Sale Personal Property, Entry Authorizing Sale of Personal Property, Notice of Sale of Personal Property [R.C. 2113.40, 2113.41] Forms 9.0, 9.1, 9.2 | Any time after appointment of Fiduciary when Court is satisfied it would be for best interest of the estate; or after filing of inventory; must give spouse ten days notice if time for spouse to take at appraised value has not expired |
| Report of Sale of Personal Property [R.C. 2113.42] | Within thirty days after sale of property |
| Application for Sale/Transfer of Motor Vehicle & Entry Form H.C. 9.4 | After appointment of Fiduciary |
| 9. Notice to Distributee Form 10.4 | Before Entry Approving and Settling Final Account if filed |