

BUTLER COUNTY PROBATE COURT

Procedure For: APPLICATION FOR EXPENDITURE OF FUNDS

Standard Probate Form Number: 15.7

Date Last Reviewed 01/28/2016

Prior to filing an Application for Expenditure of Funds

- Is there a Guardian of the Estate?
- Did the Guardian of the Estate sign the Application to Expend Funds?
- Has an Inventory been filed?

If the answer to the above questions is no, return the Application with explanation.

If the answer is yes:

- Time-stamp and track the Application (do not time-stamp any attachments)
- Complete checklist for Magistrate which includes the following:
 - Type of Guardianship
 - Date inventory, last account, last guardians report and last expert evaluation were filed
 - Is there sufficient bond?
 - Are there any court costs due?
- After completing the worksheet, check viewer to see which Judicial Officer has been handling the case.
- Send the worksheet with the Application and any attachments to Judicial Officer for signature.
- If approved:
 - Time-stamp Entry
 - Remove attachments and create exhibit file; in bottom right corner of each attachment, write date expenditure approved.
 - Certify copy of Entry
 - Mail one copy and one certified copy back to attorney
 - Send entry through for tracking/scanning; place exhibit file directly in folder (do not track or scan)
- If not able to be approved, there should be case notes asking it to be set for hearing and/or explaining what additional documentation is required.
- Notes:
 - After and Application is filed, no expenditures should be denied without hearing (per Judge's procedure dated 6/29/06)
 - No expenditure should be granted if the inventory has not been filed or if there are delinquencies.