

PROBATE COURT OF BUTLER COUNTY, OHIO
JOHN M. HOLCOMB, JUDGE

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION TO REOPEN ESTATE AND APPOINT FIDUCIARY

Applicant states that the decedent died on _____, his/her estate was administered in this county and that the fiduciary was discharged on _____. Applicant asks that the estate be reopened and that he/she be qualified as the _____ for the following reason(s):

Newly Discovered Assets:

Nature of Asset(s): _____

Amount of Asset(s): _____

There is a wrongful death or survival action or litigation (in favor of/against) the estate pending in (Specify Court, Case No. and Trial Date):

Other Claim(s):

Nature of Claim: _____

Other (please provide specifics): _____

[Check one of the following]

The decedent's will waives bond or a bond is not required by law.

Applicant offers the attached bond in the amount of \$ _____

[Check one of the following]

Applicant is:

Prior fiduciary in the estate

The alternate fiduciary named in decedent's Will

Sole beneficiary under the Will or sole heir at law

A next of kin (if there are additional next of kin with equal right to serve as fiduciary, complete and attach the Surviving Spouse, Children, Next of Kin, Legatees and Devisees (Form 1.0)

Other: _____

Attorney for Applicant

Applicant

Typed or Printed Name

Typed or Printed Name

Address

Address

Phone Number (include area code)

Phone Number (include area code)

Attorney Registration No. _____

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

ENTRY GRANTING APPLICATION TO REOPEN ESTATE AND APPOINT FIDUCIARY

Upon application to reopen the estate and appoint a fiduciary, the Court finds the same to well taken and hereby orders that the estate be reopened and that _____ be (re) appointed as _____ of the estate of _____.

The Court finds that:

Bond is dispensed with by the Will.

Bond is dispensed with by law.

The applicant has executed filed an appropriate bond, which is approved by the court.

[Check one of the following]

The fiduciary shall file a Final Account by _____

The Court orders that a status hearing shall be held on _____ at _____ AM/PM

The fiduciary shall file a Status Report within one year of the date of this entry (if opened for wrongful death or litigation proceeding) and each year thereafter until said time as the estate may be closed.

Date

Probate Judge

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

ENTRY APPOINTING FIDUCIARY; LETTERS OF AUTHORITY

[For Executors and all Administrators]

Name and Title of Fiduciary _____

On hearing in open court the application of the above fiduciary for authority to administer decedent's estate, the Court finds that:

Decedent died [check one of the following] - ☐ testate - ☐ intestate on _____, domiciled in _____.

[Check one of the following] - ☐ Bond is dispensed with by the Will - ☐ Bond is dispensed with by law - ☐ Applicant has executed and filed an appropriate bond, which is approved by the Court; and

Applicant is a suitable and competent person to execute the trust.

The Court therefore appoints applicant as such fiduciary, with the power conferred by law to fully administer decedent's estate. This entry of appointment constitutes the fiduciary's letters of authority.

Date

Probate Judge

CERTIFICATE OF APPOINTMENT AND INCUMBENCY

The above document is a true copy of the original kept by me as custodian of the records of this Court. It constitutes the appointment and letters of authority of the named fiduciary, who is qualified and acting in such capacity.

[Seal]

Probate Judge/Clerk

Date

PROBATE COURT OF BUTLER COUNTY, OHIO
JOHN M. HOLCOMB, JUDGE

ESTATE OF _____, DECEASED

CASE NO. _____

STATUS REPORT

Pursuant to the Rules of the Superintendence and the Local Rules of Court, the Fiduciary states that the estate cannot be closed at this time and hereby submits this written Status Report. **[Check whichever of the following apply]:**

- ☐ There is a wrongful death or survival action pending in (Specify Court, Case No. and Trial Date) _____.
- ☐ There is litigation (in favor of/against) the estate pending in (Specify Court, Case No. and Trial Date) _____.
- ☐ The estate is being audited by Internal Revenue Service or Ohio Department of Taxation. Expected date of resolution _____.
- ☐ There are insufficient liquid assets in the estate to pay the Ohio Estate Taxes, and the estate has been granted an extension to pay the same. Extension Date _____.
- ☐ The primary asset of the estate is real property which has not been sold or transferred (Provide reasons for lack of sale or transfer and expected date of sale or transfer) _____

_____.
- ☐ Other (please provide specifics) _____

_____.
- ☐ Additional explanation is attached hereto.
- ☐ A final account shall be filed on or before _____.

Attorney for Estate

Fiduciary

Attorney Registration Number

Date

PROBATE COURT OF BUTLER COUNTY, OHIO
JOHN M. HOLCOMB, JUDGE

ESTATE OF _____, DECEASED

CASE NO. _____

FIDUCIARY'S ACCOUNT

[R.C. 2109.30, 2109.301 and 2109.32]

[Executors and Administrators]

The fiduciary offers the account given below and on the attached itemized statement of receipts and disbursements. The fiduciary states that the account is correct, and asks that it be approved and settled.

[Check one of the following]

- ☐ This is a partial account. A statement of the assets remaining in the fiduciary's hands is attached.
- ☐ This is a final account. A statement of the assets remaining in the fiduciary's hands for distribution to the beneficiaries is attached.
- ☐ This is an account of distribution and the fiduciary asks to be discharged upon its approval and settlement.
- ☐ This is a final and distributive account and the fiduciary asks to be discharged upon its approval and settlement.
- ☐ This is a supplemental final account.

[Complete if this is a partial account, or if one or more of the accounts have previously been filed in the estate] The period of this account is from

_____ to _____

[Complete if applicable] Accounts previously filed in the estate, the accounting periods, and the fiduciary and attorney fees paid for each period, are as follows:

Date Filed	Accounting Period	Fiduciary Fees Paid	Attorney Fees Paid

Note:

2117.06(K) states: "The distributee may be liable to the estate up to the value of the distribution and may be required to return all or any part of the value of the distribution if a valid claim is subsequently made against the estate within the time permitted under this section.

2109.32(C) states: "The rights of any person with a pecuniary interest in the estate are not barred by approval of an account pursuant to division (A) and (B) of this section. These rights may be barred following a hearing on the account pursuant to section 2109.33 of the Revised Code.

CASE NO. _____

This account is recapitulated as follows:

RECEIPTS

Personal property not sold	\$ _____
Proceeds from sale of personal property	_____
Real property not sold	_____
Proceeds from sale of real property	_____
Income	_____
Other receipts	_____
Total receipts	\$ _____

DISBURSEMENTS

Fiduciary fees this accounting period	\$ _____
Attorney fees this accounting period	_____
Other administration costs and expenses	_____
Debts and claims against estate	_____
Ohio and federal estate taxes	_____
Personal property distributed in kind	_____
Real property transferred	_____
Other distributions to beneficiaries	_____
Other disbursements	_____
Total disbursements	\$ _____

BALANCE REMAINING IN FIDUCIARY'S HANDS \$ _____

Attorney

Fiduciary

Attorney Registration No. _____

Date

ENTRY SETTING HEARING

The Court sets _____ at _____ o'clock _____.M., as the date and time for hearing the above account.

Date

Probate Judge

PROBATE COURT OF BUTLER COUNTY, OHIO
JOHN M. HOLCOMB, JUDGE

ESTATE OF _____, DECEASED

CASE NO. _____

RECEIPTS AND DISBURSEMENTS

[Attach to fiduciary's account]

Page ____ of ____ pages

Following is an itemized statement of receipts and disbursements by the fiduciary in the administration of his trust.

Date	Item	Voucher No.	Value or Amount	Value or Amount
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Page	of			
Date	Item	Voucher No.	Value or Amount	Value or Amount

Fiduciary

PROBATE COURT OF BUTLER COUNTY, OHIO
JOHN M. HOLCOMB, JUDGE

ESTATE OF _____

CASE NO. _____

**CERTIFICATE OF SERVICE OF ACCOUNT
TO HEIRS OR BENEFICIARIES**
[R.C. 2109.32]

This is to certify that a true and accurate copy of the _____ account was
Type of Account

served _____ upon all beneficiaries of the estate except:
Date

☐ The following heir or beneficiary whose address is unknown:

☐ The following beneficiary of a specific bequest or devise who has received his or her distribution and for which a receipt has been filed or exhibited with the Court:

Attorney for Fiduciary

Fiduciary

Typed or Printed Name

Address

Phone Number (include area code)

Attorney Registration No. _____