CHECKLIST FOR INVENTORY-ESTATE ADMINISTRATION

(Disclaimer: This checklist is intended as a guideline only and is subject to modification by the Court at any time)

The Inventory is due **3 months** after the date of appointment. R.C. 2115.02.

REQUIRED DOCUMENTS:

☐ Inventory and Appraisal (Form 6.0)
☐ Schedule of Assets (Form 6.1)
- o The Schedule of Assets must set forth the requisite proof of valuation and reflect values as of the date of death of the decedent.
- o The required proof of valuation includes:
  - Automobile(s): Kelley Blue Book or the NADA value. The Year, Make, Model and VIN must also be listed.
  - Bank Accounts must be identified by listing the last four digits of the account number(s).
  - Stocks must be identified by name, amount of shares, and value per share.
  - Bonds must be identified by type, number of bonds, and value.
  - Checks must be identified by check number.
  - Real Estate must be identified by address, parcel number, and legal description. Proof of Value can include either county auditor tax valuation OR the Appointment of an Appraiser (Form 3.0) in compliance with Lake County Local Rule 61 and a completed appraisal report.
- o Any assets subject to appraisal require the filing of Form 3.0 (Appointment of Appraiser) prior to the filing of the Inventory and, if approved by the Court, the appraiser must sign the Appraiser's Certificate on page 1 of the Inventory.

☐ Certificate of Service on Inventory (LCPC Form 6.3 AA)
- o See Lake County Local Rule 94.3 for requirements

OTHER INVENTORY–RELATED DOCUMENTS:

☐ Waiver of Notice of Hearing on Inventory (Form 6.2)
☐ Notice of Hearing on Inventory (Form 6.3)
☐ Green cards (Certified Mail Cards) showing proof of service
☐ Motion to Correct Inventory (See Lake County Local Rule 94.2). **Filing Fee $5.00**
-if you need to add new an item or items to the inventory, please see R.C 2113.69 (newly discovered assets).

Lake County Court of Common Pleas
Division of Probate
Judge Mark J. Bartolotta

Lake County Courthouse, West Annex
25 North Park Place
Painesville, Ohio 44077
Mailing Address: P.O Box 490
Painesville, Ohio 44077
#440-350-2626
https://www.lakecountyohio.gov/probate-court/

PROBATE COURT OF LAKE COUNTY, OHIO
JUDGE MARK J. BARTOLOTTA

ESTATE OF _____, DECEASED

CASE NO. _____

INVENTORY AND APPRAISAL

[R.C. 2115.02 and 2115.09] – Date of Death After April 5, 2017

To the knowledge of the fiduciary the attached schedule of assets in decedent's estate is complete. The fiduciary determined the value of those assets whose values were readily ascertainable and which were not appraised by the appraiser, and that such values are correct.

The estate is recapitulated as follows:

Tangible personal property……$_____

Intangible personal property……..$_____

Real property……$_____

Total……...$_____

Automobiles transferred to surviving spouse under R.C. 2106.18

Value(s): $ _____, $_____, $_____, $ _____,
$ _____, $_____, $_____, $ _____

Total value [not to exceed $65,000.00]…….. $_____

☐ The fiduciary is also the surviving spouse of the decedent and waives notice of the taking of the inventory.

_____ _____
Attorney Fiduciary

Attorney Registration No. _____

APPRAISER'S CERTIFICATE

The undersigned appraiser agreed to act as appraiser of decedent's estate and to appraise the property exhibited truly, honestly, impartially, and to the best of the appraiser's knowledge and ability. The appraiser further says that those assets whose values were not readily ascertainable are indicated on the attached schedule by a check in the "Appraised" column opposite each such item, and that such values are correct.

_____
Appraiser

CASE NO. _____

WAIVER OF NOTICE OF TAKING OF INVENTORY

[R.C. 2115.04]

The undersigned surviving spouse hereby waives notice of the time and place of taking the inventory of decedent's estate.

_____
Surviving Spouse

WAIVER OF NOTICE OF HEARING ON INVENTORY

[Use when notice is required by the Court or deemed necessary by the fiduciary]

The undersigned, who are interested in the estate, waive notice of the hearing on the inventory.

_____ _____

_____ _____

_____ _____

_____ _____

_____ _____

_____ _____

_____ _____

ENTRY SETTING HEARING

The Court sets _____ at _____ o'clock _____.M., as the date and time for hearing the inventory of decedent's estate.

_____ _____
Date Probate Judge

PROBATE COURT OF LAKE COUNTY, OHIO
JUDGE MARK J. BARTOLOTTA

ESTATE OF _____, **DECEASED**

CASE NO. _____

SCHEDULE OF ASSETS

[Attach to Inventory and Appraisal]

Page ___ of ___ pages.

(Insert a check in the column "Appraised" opposite an item if it was valued by the appraiser. Leave blank if the readily ascertainable value was determined by the fiduciary.)

Item	Appraised	Value
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	
	☐	

_____

Fiduciary

CASE NO. _____

_____	☐	$_____
_____	☐	$_____
_____	☐	$_____
_____	☐	$_____
_____	☐	$_____
_____	☐	$_____
_____	☐	$_____
_____	☐	$_____
_____	☐	$_____
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_____	☐	$_____
_____	☐	$_____
_____	☐	$_____

_____
Fiduciary

PROBATE COURT OF LAKE COUNTY, OHIO
JUDGE MARK J. BARTOLOTTA

ESTATE OF _____, DECEASED

CASE NO. _____

CERTIFICATE OF SERVICE OF NOTICE OF HEARING ON INVENTORY

[Local Rule 94.3]

The undersigned hereby states that all persons required to receive notice as provided in Ohio R.C. 2115.16 have received or waived notice of the hearing on the Inventory filed.

_____
Fiduciary or Attorney for Estate

Prepared by: _____

Attorney's Name: _____

Address: _____

_____

Phone: _____