

CHECKLIST FOR INVENTORY-GUARDIANSHIP

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

INVENTORY FILING FEE: \$20.00 (Cash/ Check/ Money Order Only)

Inventory is due 3 months after the date of appointment. See Superintendence Rule 66(B), R.C. 2111.14(A), and Lake County Local Rule 66.12.

REQUIRED DOCUMENTS:

☐ Inventory (Form 15.5)

- A full inventory of the real and personal property of the ward, its value, and the value of the yearly rent of any real property must be included on the Inventory. If additional space is required, please attach a continued list of assets to Form 15.5.
- 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. The Title of any vehicle must also be submitted to the Court.
 - Bank Accounts must be identified by listing the last four digits of the account number(s).
 - Bonds must be identified by type, number of bonds, and date of death value.
 - Social Security income must identify the specific monthly amount multiplied by 12 to show annual total.
 - Annuities must be identified by name and the last four digits of the account number(s).
 - Real Estate must be identified by address. The county auditor tax valuation and legal description of property must be submitted to the Court.
 - Rental income from any real property must identify the specific monthly amount multiplied by 12 to show the total yearly rent of real estate.

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
www.lakecountyohio.gov/probatelco

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

IN THE MATTER OF THE GUARDIANSHIP OF _____

CASE NO. _____

GUARDIAN'S INVENTORY
[R.C. 2111.14(A)]

**of the real and personal estate of the ward with its
value and the value of the yearly rent of the real estate**

List any safe deposit box and date and location of any will. \$ _____

RECAPITULATION

Total value of Personal Estate \$ _____

Total value of Real Estate \$ _____

Yearly rent of Real Estate \$ _____

Other Annual Income \$ _____

Total \$ _____

Guardian