

**CHECKLIST- INITIAL FILING OF FULL ADMINISTRATION OF ESTATE INTESTATE (NO WILL)**  
**(Disclaimer: This checklist is intended as a guideline only and is subject to modification by the Court at any time)**

DEPOSIT \$200.00 (Additional court costs depend on what is filed and those fees will be due at the time of additional filings.)

-Cash / Check / Money Order Only

REQUIREMENTS

The decedent must have been a resident of Lake County, Ohio at the time of death, or owned real estate in Lake County.  
See R.C. 2109.02 and 2109.07 for additional Requirements.

**Note: All paperwork should be typed, single sided, and please do not staple originals.**  
**All documents being filed must have original signature.**

INITIAL FILING

- ☐ Photocopy of the death certificate – with the Social Security number redacted (must state Lake County resident)
- ☐ Application for Authority to Administer Estate (Form 4.0)
- ☐ Surviving Spouse, Children, Next of Kin, Legatees and Devisees (Form 1.0)
  - o If there is a Surviving Spouse, mark the box that applies at the bottom of this form.
- ☐ Appointment of Appraiser (See R.C. 2109.02 and 2109.07) *If applicable*
  - o If asking the Court to approve an Appraiser, file the Application for Appointment of Appraiser (Form 3.0)
    - If this form is filed, the applicant must include the Appraisers credentials, and Name, Address, and Phone Number.
  - o If using the Auditor Valuation, you do not need to file this paperwork.
- ☐ Waiver of Right to Administer (Form 4.3) *If applicable*
  - o Must be an Ohio resident to serve as Administrator. We do not need waivers from anyone out of state.
  - o If the surviving spouse is the Applicant, then we do not need waivers from anyone.
  - o If there is not a surviving spouse, or surviving spouse is not the Applicant, and there is more than one person on the front page of Form 1.0, then everyone other than the Applicant needs to waive.
- ☐ Instructions for Service, *If applicable*
  - o If an individual with an equal right to serve as Administrator does not waive right to administer, then they must receive notice of the Application. (Ohio residents only)
- ☐ Fiduciary's Bond (Form 4.2) *If applicable*
  - o If sole beneficiary under the will or real estate only, no bond is required.
  - o If all heirs consent, a motion to waive bond may be filed (LCPC Form 4.1).
  - o If bond is needed, bond amount must be twice the amount of personal property and any annual rental income.

*If there is a Surviving Spouse, complete one of the following regarding surviving spouse's elective rights:*

If spouse waives notice of service of citation to elect:

- o If an individual with an equal right to serve as Administrator does not waive right to administer, then they must receive notice of the Application. (Ohio Residents only)

OR

If spouse does not waive notice, the following forms will be served via certified mail by court (Cost: \$25.00):

- o Citation to Surviving Spouse to Exercise Elective Rights (Form 8.0)
- o Summary of General Rights of Surviving Spouse (Form 8.3)
- o Certificate of Service and Notice of Citation to Surviving Spouse to Exercise Elective Rights (Form 8.4)

