

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)
 - The Schedule of Assets must set forth the requisite proof of valuation and reflect values as of the date of death of the decedent.
 - 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.
 - 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)
 - 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 a new item or items to the inventory, please see R.C 2113.69
(LCPC Form 6.15- Report of Newly Discovered Assets and Judgment Entry)

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



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<https://www.lakecountyohio.gov/probate-court/>