

PROBATE COURT OF LUCAS COUNTY, OHIO

JACK R. PUFFENBERGER, JUDGE

IN THE MATTER OF \_\_\_\_\_

CASE NO. \_\_\_\_\_

ATTORNEY/FIDUCIARY INVENTORY CHECKLIST

In order for the Court to approve the above-referenced inventory, the fiduciary and attorney (if any) must certify that the following information has been provided and any additional requirements noted by the Court have been addressed. PLEASE ADDRESS EACH ITEM LISTED BY CHECKING EITHER YES OR N/A (NOT APPLICABLE).

Yes N/A

- The Inventory and Appraisal, Schedule of Assets and Certificate of Service of Inventory to Heirs and Beneficiaries have been signed by the fiduciary and attorney (if any).
- An Order Approving Inventory and Appraisal is attached.
- The recapitulation on the Inventory and Appraisal matched the Schedule of Assets.
- All of decedent's probate assets, including real and personal property has been listed on the schedule of assets with date of death values.
- Any real estate listed includes the complete legal description, including parcel number.
- Any vehicles listed include make, model, year and VIN numbers for each vehicle.
- Asset valuations are attached, including Kelley Blue Book valuation, AREIS valuation or Appraisal or the Appraiser's Certificate on the 6.0 has been completed.
- If an appraisal is needed the Appointment of appraiser form has been filed and approved.
- Any accounts listed are identified by account numbers or a Confidential Disclosure of Personal Identifiers has been filed.
- Business valuation or appraiser has been included (if any).
- Any savings bonds listed are identified by serial number and value.
- Any assets transferred from a guardianship have been included.
- Any bond or additional bond needed has been filed.
- If this is a Successor Fiduciary account, the final account for the previous fiduciary has been filed and approved.
- I have listed any missing forms or documents below:

\_\_\_\_\_  
\_\_\_\_\_

Missing forms or documents may be sent to [accounts@lucasprobate.org](mailto:accounts@lucasprobate.org).

I hereby certify that I have provided all the documentation, approvals, and forms required unless specifically noted above.

\_\_\_\_\_  
Attorney

\_\_\_\_\_  
Fiduciary

\_\_\_\_\_  
Email address

\_\_\_\_\_  
Email address