

PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, JUDGE

IN THE MATTER OF THE CONSERVATORSHIP OF _____

CASE NO. _____

APPLICATION FOR APPOINTMENT OF CONSERVATOR
(R.C. 2111.021)

I, _____, Petitioner, hereby state that I am a competent adult but am physically infirm. I request that:

1. Name of Proposed Conservator _____

Street _____

City _____, Ohio (Zip) _____ Telephone (____) _____

be appointed conservator of my:

- Person and Estate Person Only Estate Only

2. The length (time period) of the conservatorship is:

- Indefinite Definite – to _____, 20__

3. (If “Person Only” or “Person and Estate” is checked), I give the following power over my PERSON to the:

a. Conservator:

1. All powers that a guardian would have under the guardianship laws of Ohio.
 2. Limited to the power to:

b. Court:

1. All powers that a Court would have under the guardianship laws of Ohio.
 2. Limited to the power to:

4. (If “Estate Only” or “Person and Estate” is checked), I give the following power over my ESTATE to the:

a. Conservator:

1. All powers that a Court would have under the guardianship laws of Ohio.
 2. Limited to the power to:



b. Court:

- 1. All powers that a Court would have under the guardianship laws of Ohio.
- 2. Limited to the power to:

c. The following of my property is subject to the foregoing powers:

- 1. All property. (Attach description of property.)
- 2. Only the property listed as follows:

5. If the application is for a conservatorship of the estate:

a. The estate to be placed under conservatorship is:

Personal Property		\$ _____
Real Property		\$ _____
Annual Rents		\$ _____
Other Annual Income		\$ _____
TOTAL		\$ _____

b. A bond in the amount of \$ _____ is attached.
(R.C. 2109.04(A)(1)) (Form 15.3)

6. Service of notice of the conservatorship is to be given to:

- None Same as Guardianship As Listed on Form 15.0

Based on the foregoing information, I do hereby petition the Court to appoint a Conservator for myself, and do so freely and of my own will. I certify that all information and statements contained in this application and the attached exhibits are correct to the best of my knowledge and belief.

Date

Attorney's Signature

Applicant's Signature

(Type or Print Attorney's Name)

(Type or Print Applicant's Name)

(Street)

(Street)

(City, State, Zip Code)

(City, State, Zip Code)

(Telephone Number-Include Area Code)

(Telephone Number-Include Area Code)

Supreme Court Registration Number

PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, JUDGE

IN THE MATTER OF THE GUARDIANSHIP OF _____

CASE NO.: _____

SUPPLEMENTAL GUARDIANSHIP/CONSERVATOR INFORMATION

(Attach to all new and successor guardianship or conservator applications)

GENERAL CASE INFORMATION

(Check one box on each line for items 1 through 7)

1. This is a: guardianship conservatorship
2. This application is a new case successor
3. The subject is a minor incompetent conservator
4. The fiduciary powers are limited unlimited
5. The application is for a person estate person and estate
6. Is this case related to any cause pending in any judicial system?
 Yes No If Yes, describe in detail:
7. A court reporter and official record is waived for the appointment hearing
 waived not waived

(This waiver may be retracted in writing by counsel or guardian at or before the appointment hearing. However, if necessary, the Court may continue the hearing to schedule a reporter.)

INFORMATION CONCERNING THE PROSPECTIVE GUARDIAN/CONSERVATOR

Full Name and AKA: _____

Home Address: _____

Relationship to Ward/Conservatee: _____

Occupation: _____



CASE NO.: _____

Telephone No. (Home): _____ (Work): _____

Applicant (is is not) an administrator, executor, or fiduciary of the estate wherein the proposed ward/conservatee is interest.

INFORMATION CONCERNING THE PROPOSED WARD/CONSERVATEE:

Full Name and AKA: _____

Age: ___ Date of Birth: _____ Male: ___ Female: ___

Legal Settlement or Residence is: _____

_____ in _____ County,

Ohio. Length of residence is: _____ . If the proposed

ward/conservatee is living at an address different from the residence shown above , the address is

_____ .

Name of person, other than the proposed ward/conservatee who may be contacted at the address where proposed ward/conservatee is living: Name _____

Telephone _____

List any problems that proposed ward/conservatee may have in communicating:

List any agencies, either private or public, who have knowledge of the proposed ward/conservatee, and may be aware of assistance in determining the need for guardianship/conservatorship:

INFORMATION CONCERNING NEED FOR GUARDIANSHIP:

Describe briefly the basis for application:

I hereby petition the Court to be appointed guardian/conservator of foregoing proposed ward/conservatee and certify that all the information and statements contained in this application and attached exhibits are correct to the best of my knowledge and belief.

Signature of Attorney of Record

ID#

Signature of Prospective Guardian/Conservator

Signature of Proposed Conservatee (Conservatorship only)

I, _____, Attorney-at-law,
hereby certify, that the within instrument was
prepared and/or examined by me, and that the
same, in my opinion, is correct and proper.

**PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, JUDGE**

IN THE MATTER OF THE GUARDIANSHIP OF _____

CASE NO.: _____

**NEXT OF KIN OF PROPOSED WARD
(R.C. 2111.04)**

(NOTE: Specify age and Birthdate of each minor under 16 on the line containing the minor's name. List the name and address of the minor's parent, guardian or custodian on the name and address lines following the minor's address.)

Service Waived	Relationship	Birthdate Of Minor
1. () Name _____		
Address _____	Zip _____	
2. () Name _____		
Address _____	Zip _____	
3. () Name _____		
Address _____	Zip _____	
4. () Name _____		
Address _____	Zip _____	
5. () Name _____		
Address _____	Zip _____	
6. () Name _____		
Address _____	Zip _____	
7. () Name _____		
Address _____	Zip _____	
8. () Name _____		
Address _____	Zip _____	
9. () Name _____		
Address _____	Zip _____	
10. () Name _____		
Address _____	Zip _____	

Date

Applicant

I, _____, Attorney-at-law,
hereby certify, that the within instrument was
prepared and/or examined by me, and that the
same, in my opinion, is correct and proper



PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, JUDGE

**CONSERVATORSHIP OF
GUARDIANSHIP OF
ESTATE OF
MISCELLANEOUS
NAME CHANGE OF
TRUST OF _____,**

CASE NO. _____

By my signature below, I hereby authorize the release of any and all records or information that your agency may have pertaining to me to the Probate Court of Lucas County, Ohio.

I further understand that my social security number, driver's license number and birthday listed on the attached sheet shall be used for conducting the record check and upon the conclusion of the record check that the attached sheet containing my social security number, driver license number and birth date shall be destroyed.

Date

Typed Name

CONCLUSION OF RECORD CHECK

- Records checked and found to be in order.
- Records checked and found not to be in order.
- Record Check Information Sheet destroyed.
- Record Check Information Sheet returned to attorney.

Date

Deputy Clerk

I, _____, Attorney at law hereby certify, that the within instrument was prepared and/or examined by me, and that the same, in my opinion, is correct and proper.

Attorney Ohio Supreme Court Number

RECORD CHECK
INFORMATION SHEET

Name: _____

Address:

Date of Birth: _____

Social Security Number: _____

Driver License Number: _____

PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, JUDGE

IN THE MATTER OF THE GUARDIANSHIP OF _____
CASE NO. _____

JUDGMENT ENTRY
SETTING HEARING ON APPLICATION FOR APPOINTMENT
OF GUARDIAN

This day _____ appeared in open Court, and filed an application for the appointment of guardian (limited guardian) of the person and estate person only estate only, of _____. It is ordered that the ____ day of _____, 20__ at _____ o' clock ____ (a.m. / p.m.), be and is hereby fixed as the time of hearing said application before this Court. It is further ordered that written notice be served personally upon minors over fourteen years of age and in the manner as is provided by law upon all others entitled to receive the same.

Date

Judge Jack R. Puffenberger

I, _____, Attorney-at-law, hereby certify, that the within instrument was prepared and/or examined by me, and that the same, in my opinion, is correct and proper.



PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, JUDGE

IN THE MATTER OF THE CONSERVATORSHIP OF _____
CASE NO. _____

JUDGMENT ENTRY
APPOINTMENT OF CONSERVATOR
(R.C. 2111.021)

Upon hearing the application for appointment of a Conservator herein, the Court finds that the petitioner is a resident of this County, or has legal settlement herein; that this Court has jurisdiction; and that _____ is a competent, but physically infirm adult, who has voluntarily petitioned for, and the Court does declare _____ as his/her Conservator, and grants to the Conservator powers fully described in the Letters of Conservatorship.

The Court further finds that powers of the Court shall be:

1. Full power as prescribed in the Laws of Guardianship of the State of Ohio.
2. Limited to the following powers, but not limited to the power to set bond, and all powers in Section 2111.021 of the Ohio Revised Code.

The Court approves the bond as filed.

The Court Orders Letters of Conservatorship issue to _____
as provided by law.

Date

Judge Jack R. Puffenberger

I, _____, Attorney-at-law,
hereby certify, that the within instrument was
prepared and/or examined by me, and that the
same, in my opinion, is correct and proper.



**PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, JUDGE**

IN THE MATTER OF THE GUARDIANSHIP OF _____

CASE NO. _____

FIDUCIARY'S ACCEPTANCE

GUARDIAN

[R.C. 2111.14]

I, the undersigned, hereby accept the duties which are required of me by law, and such additional duties as are ordered by the Court having jurisdiction.

AS GUARDIAN OF THE ESTATE, I WILL:

1. Make and file an inventory of the real and personal estate of the ward within 3 months after my appointment.
2. Deposit funds which come into my hands in a lawful depository located within this state.
3. Invest surplus funds in a lawful manner.
4. Make and file an account biennially, or as directed by the Court.
5. File a final account within 30 days after the guardianship is terminated.
6. Inventory any safe deposit box of the ward.
7. Preserve any and all Wills of the ward as directed by the Court.
8. Expend funds only upon written approval of the Court.
9. Make and file a guardian's report biennially, or as directed by the Court.

AS GUARDIAN OF THE PERSON, I WILL:

1. Protect and control the person of my ward, and make all decisions for the ward based upon the best interest of the ward.
2. Provide suitable maintenance for my ward when necessary.
3. Provide such maintenance and education for my ward as the amount of the estate justifies if the ward is a minor and has no parents, or has a parent who fails to maintain and educate the ward.
4. Make and file a guardian's report biennially, or as directed by the Court.
5. Obey all orders and judgments of the Court pertaining to the guardianship.
6. Obtain the written approval of the Court before executing a caretaker power of attorney authorized by R.C. 3109.52.

If I change my address or the ward's address, I shall immediately notify Probate Court in writing. I acknowledge that I am subject to removal as such fiduciary if I fail to perform such duties. I also acknowledge that I am subject to possible penalties for improper conversion of the property which I hold as such fiduciary.

Date

Fiduciary

PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, JUDGE

GUARDIANSHIP OF _____

CASE NO. _____

OATH OF GUARDIAN

[R.C. 2111.02 (C)]

[To be taken on Appointment of Guardian]

I, _____, Guardian of

_____, will faithfully and completely fulfill my

duties as Guardian, including the duty:

- To file, and continue to make diligent efforts to file, a true inventory in accordance with the Ohio Revised Code, and report all assets belonging to the estate of my ward.
- To file timely and accurate reports.
- To file timely and accurate accounts.
- To, at all times, protect my ward's interests and to make all decisions based on the best interest of my ward.
- To apply to the Court for authority to expend funds prior to so doing.
- To obey all orders and rules of the Court pertaining to guardianships.

Guardian

The above oath was taken and signed in my presence on this ____ day of _____, 20__.

Judge Jack R. Puffenberger/Magistrate

I, _____, Attorney-at-law,
hereby certify, that the within instrument was
prepared and/or examined by me, and that the
same, in my opinion, is correct and proper.



PROBATE COURT OF LUCAS COUNTY, OHIO
JACK R. PUFFENBERGER, JUDGE

IN THE MATTER OF THE CONSERVATORSHIP OF _____

CASE NO. _____

LETTERS OF CONSERVATORSHIP

_____ is appointed Conservator
of _____.

As Conservator, his/her powers are:

1. All powers conferred by the Guardianship laws of Ohio and the Rules of this Court over the conservatee's:

Person and Estate Person Only Estate Only

2. Those guardianship powers, until revoked, are for an:

Indefinite time period

Definite time period to _____, 20____

3. The Conservator's powers are limited to:

4. The following property of the conservatee is subject to the above power of the conservator:

All property.

Only the property listed as follows:

The above-named Conservator has the power conferred by law to do and perform all the duties of Conservator as described.

Date

Judge Jack R. Puffenberger

NOTE TO FINANCIAL INSTITUTIONS

Funds being held in the name of the within-named Conservatee shall not be released to Conservator without a court order directing release of a specific fund and amounts thereof.

