

## INSTRUCTIONS FOR FILING SUMMARY RELEASE FROM ADMINISTRATION

### A Summary Release from Administration may be filed if:

- The value of the estate is \$5,000.00 or less, and the applicant paid the funeral bill or is obligated in writing to pay the funeral bill, or
- There is a surviving spouse, the assets do not exceed \$45,000.00, the spouse is entitled to 100% of the family allowance, and the funeral bill has been prepaid or the surviving spouse is obligated to pay the funeral bill.

### What I need when I file:

- The original Will if the deceased person had one.
- Receipt of a paid funeral bill, or if not available, the funeral bill. The receipt or funeral bill must show the applicant's payment or obligation to pay the funeral/burial expenses.
- Title(s) of automobile(s), bank account numbers, stock certificate numbers, insurance policy numbers, etc.
- The market value of real property as found in Lucas County Auditor's records (AREIS).
- The market or book value of any motor vehicle, ATVs, motorcycles, personal watercraft, snowmobiles, trailers, utility vehicles, power boats, sailboats, motor homes, camping trailers, truck campers, etc. as found in a current, nationally recognized used car guide.
- Signature of applicant must be notarized.

### File these forms (if there is an original Will):

- **Form 2-B** If a Will but there is no need to probate (skip Forms 2.0, 2.1 & 2.4)
- **Form 1-A** New Case Information Sheet
- **Form 2.0** – Application to Probate Will
- **Form 2.1** – Waiver of Notice of Probate of Will
- **Form 2.4** – Certificate of Service of Notice of Probate of Will
- **Form 1.0** – Surviving Spouse, Next of Kin
- **Form 5.10** – Application for Summary Release from Administration
- **Form 5.11** – Entry Granting Summary Release from Administration
- **Form 9-C** Application for Transfer of Titled Vehicle (if necessary)
- **Form 9CA** Assignment of Titled Vehicle (if necessary)
- **Form 12.0** – Application for Certificate of Transfer (Real estate only) if necessary
- **Form 12.1** – Certificate of Transfer (Real estate only) if necessary

### File these forms (if there is not an original Will):

- **Form 5.10** – Application for Summary Release from Administration
- **Form 1.0** – Surviving Spouse, Next of Kin
- **Form 5.11** – Entry Granting Summary Release from Administration
- **Form 9-C** Application for Transfer of Titled Vehicle (if necessary)
- **Form 9-CA** Assignment of Titled Vehicle (if necessary)
- **Form 12.0** – Application for Certificate of Transfer (Real estate only)
- **Form 12.1** – Certificate of Transfer (Real estate only)

### Filing Fee:

- The filing fee is \$105 (with a Will); \$95 (without a Will).
- Transferring real estate requires an additional fee of \$10. Add \$10/\$15 for an automobile transfer.

## INSTRUCTIONS FOR FILING RELIEF FROM ADMINISTRATION

### A Relief from Administration may be filed if:

- There is no surviving spouse and assets are \$15,000 or less and decedent died on or after 1/1/1976; assets are \$25,000 or less and decedent died on or after 10/20/1987; assets are \$35,000 or less and decedent died on or after 1/9/1994.
- There is a surviving spouse and assets are \$50,000.00 or less and the decedent died on or after 1/16/1993; assets are \$85,000 or less and the decedent died on or after 9/14/1993; assets are \$100,000 or less and the decedent died on or after 3/18/1999.
- All signatures must be original (no copies).

### What I need when I file:

- The original Will if the deceased person had one.
- Receipt of a paid funeral bill, or if not available, the funeral bill. The receipt or funeral bill must show the applicant's payment or obligation to pay the funeral/burial expenses.
- Title(s) of automobile(s), bank account numbers, stock certificate numbers, insurance policy numbers, etc.
- The market value of real property as found in Lucas County Auditor records (AREIS).
- The market or book value of any motor vehicle, ATVs, motorcycles, personal watercraft, snowmobiles, trailers, utility vehicles, power boats, sailboats, motor homes, camping trailers, truck campers, etc. as found in a current, nationally recognized used car guide.
- Applicant must be an Ohio resident.

### File these forms (if there is an original Will):

- **Form 1-A** New Case Information Sheet
- **Form 2.0** – Application to Probate Will
- **Form 2.1** – Waiver of Notice of Probate of Will
- **Form 2.4** – Certificate of Service of Notice of Probate of Will
- **Form 1.0** – Surviving Spouse, Next of Kin
- **Form 5.0** – Application to Relieve Estate from Administration
- **Form 5.1** – Assets and Liabilities of Estate to be Relieved from Administration
- **Form 5.2** – Waiver of Notice of Application to Relieve Estate from Administration
- **Form 5.6** – Entry Relieving Estate from Administration
- **Form 9-C** Application for Transfer of Titled Vehicle (if necessary)
- **Form 9-CA** Assignment of Titled Vehicle (if necessary)
- **Form 12.0** – Application for Certificate of Transfer (Real estate only) if necessary
- **Form 12.1** – Certificate of Transfer (Real estate only) if necessary

### File these forms (if there is not an original Will):

- **Form 5.0** – Application to Relieve Estate from Administration
- **Form 1.0** – Surviving Spouse, Next of Kin
- **Form 5.1** – Assets and Liabilities of Estate to be Relieved from Administration
- **Form 5.2** – Waiver of Notice of Application to Relieve Estate from Administration
- **Form 5.6** – Entry Relieving Estate from Administration
- **Form 9-C** Application for Transfer of Titled Vehicle (if necessary)
- **Form 9-CA** Assignment of Titled Vehicle (if necessary)
- **Form 12.0** – Application for Certificate of Transfer (Real estate only)
- **Form 12.1** – Certificate of Transfer (Real estate only)

### Filing Fee:

- The filing fee is \$90 without a Will, \$130 with a Will, add \$5 if Commissioner is appointed
- Transferring real estate requires an additional fee of \$10. Add \$10/\$15 for an automobile transfer.

## INSTRUCTIONS FOR FILING A FULL ADMINISTRATION

### Full Administration of an Estate is necessary when:

- There is a surviving spouse of the deceased person and the total value of the deceased person's assets is greater than \$100,000.
- There is no surviving spouse and the total value of the deceased person's assets is greater than \$35,000.
- A Wrongful Death/Litigation Action is filed at the Court.

### What I need when Filing:

- The original Will if the deceased person had one.
- Type or clearly print all forms.
- All signatures must be original (no copies).

### These forms must be filed to open an estate with a Will:

- **Form RRCPF** Record Check on Proposed Fiduciary
- **Form 1-A** New Case Information Sheet
- **Form 2.0** – Application to Probate Will/Entry Admitting Will to Probate
- **Form 1.0** – Surviving Spouse, Next of Kin, Legatees and Devises
- **Form 2.1** – Waiver of Notice of Probate of Will
- **Form 4.0** – Application for Authority to Administer Estate
- **Form 4.3** – Waiver of Right to Administer
- **Form 4.4** – Notice Of Hearing On Appointment Of Fiduciary
- **Form 4.5** Entry Appointing Fiduciary; Letter of Authority
- **Form 3.0** – Appointment of Appraiser
- **Form 4.2** – Fiduciary's Bond
- **Form 2.4** – Certificate Of Service Of Notice Of Probate Of Will

### These forms must be filed to open an estate without a Will:

- **Form RRCPF** Record Check on Proposed Fiduciary
- **Form 1-A** New Case Information Sheet
- **Form 4.0** – Application for Authority to Administer Estate
- **Form 1.0** – Surviving Spouse, Next of Kin, Legatees and Devises
- **Form 4.3** – Waiver of Right to Administer
- **Form 4.4** – Notice Of Hearing On Appointment Of Fiduciary
- **Form 4.5** Entry Appointing Fiduciary; Letter of Authority
- **Form 3.0** – Appointment of Appraiser
- **Form 4.2** – Fiduciary's Bond (if necessary)

### Filing Fee:

- Filing fee is \$350.