

**PROBATE COURT OF LUCAS COUNTY, OHIO**

**JACK R. PUFFENBERGER, JUDGE**

IN THE MATTER OF \_\_\_\_\_ CASE NUMBER \_\_\_\_\_

**DECEDENT'S ESTATE**

**ATTORNEY/FIDUCIARY ACCOUNT CHECKLIST**

**In order for the Court to approve the above-referenced account, 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.:**

- The account and all relevant forms are signed by the fiduciary and attorney (if any)
- Any required vouchers or receipts have been presented and totaled
- All checks written have been cashed or cancelled
- Bank or other financial institution certification is attached
- All assets remaining in the fiduciary's hands are itemized
- Ending balance from previous account agrees with beginning balance in present account
- Recapitulation figures are completed and receipts and disbursements totals match the assets remaining (if any)
- Attorney fee application, contract, or computation has been submitted and /or approved
- Fiduciary fee application/ computation has been approved
- Application to Extend Administration, if needed, has been approved
- Certificate of Service of Account to Heirs or Beneficiaries or waivers have been filed
- Status Report has been filed unless you are filing a final account
- Certificate of Service of Notice of Probate of Will (if applicable) has been filed
- Verification is provided that bond has been filed and, if applicable, renewed in the amount of two times the value of the personal property
- If real estate was sold a complete copy of the settlement /escrow statement is attached to account
- Surviving Spouse (if applicable) has filed election or the time for filing has passed
- Affidavit concerning Investments (if applicable) is being filed with the account
- Any distributions to minors or wards have been  Deposited in a Guardianship Estate,  Deposited in a financial institution and Forms 16(A) and 16(B) are filed with the account,  Placed in a Trust, or  Distributed pursuant to a court order.

**In addition to the above if this is a Final Account:**

- Court costs have been paid in full
- All creditor claims have been rejected, paid or compromised

**I have listed any missing forms or documents below:**

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

**Voucher (supporting documentation) provided to the Court —**

As of June 2023, **THE ACCOUNTS DEPARTMENT WILL NO LONGER PLACE VOUCHERS IN THE ATTORNEY PICK-UP BOXES AFTER COMPLETION OF THE AUDIT.** The Court prefers that all vouchers for the account be emailed to [accounts@lucasprobate.org](mailto:accounts@lucasprobate.org).

If physical vouchers are provided with an account, please check one of the following boxes:

- A Self-Addressed Stamped Envelope is provided to mail all vouchers after the account has been audited.
- All physical vouchers provided to the Court can be destroyed after the account has been audited.

**\*Please note, if a box is not checked and a self-addressed stamped envelope is not provided to the court at the time of filing; THE COURT WILL DESTROY ALL PHYSICAL VOUCHERS PROVIDED AFTER THE ACCOUNT AUDIT.**

I hereby certify that I have provided all of the documentations, approvals, forms and required court cost payments unless specifically noted above.

\_\_\_\_\_  
Attorney

\_\_\_\_\_  
Fiduciary

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

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