

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

ESTATE OF _____, DECEASED

CASE NO. _____

NEW CASE INFORMATION STATEMENT

- THE UNDERSIGNED CERTIFIES THAT THE WILLS ON DEPOSIT HAVE BEEN EXAMINED AND NO LATER WILL WAS FOUND ON DEPOSIT FOR THIS DECEDENT.
- WILL DEPOSITED IN THIS COURT ON _____ IS HEREBY WITHDRAWN AND ATTACHED HERETO.

DEPUTY CLERK, PROBATE COURT

ATTORNEY OF RECORD TO COMPLETE THE FOLLOWING SECTION

THE UNDERSIGNED CERTIFIES THAT THIS CASE IS, IS NOT RELATED TO ANY CASE NOW PENDING IN ANY JUDICIAL SYSTEM.

CASE NUMBER OF RELATED CASE _____

DESCRIPTION AND JURISDICTION OF RELATED CASE _____

PLEASE CHECK ONE OF THE FOLLOWING:

- ESTATE OR RELIEF FILED HEREWITH WILL ONLY TAX ONLY REAL ESTATE ONLY
- ESTATE OR RELIEF EXPECTED TO BE FILED ON OR BEFORE _____
- OTHER _____

PLEASE CHECK ONE OF THE FOLLOWING REGARDING CITATION TO THE SURVIVING SPOUSE:

- DATE OF DEATH IS ON OR AFTER JANUARY 1, 2002, CITATION TO SURVIVING SPOUSE TO ISSUE

FOR DATES OF DEATH PRIOR TO JANUARY 1, 2002

- SPOUSE IS SOLE BENEFICIARY, CITATION IS UNNECESSARY
- SPOUSE IS NOT SOLE BENEFICIARY, PLEASE ISSUE A CITATION
- NO SURVIVING SPOUSE
- NO WILL FILED FOR PROBATE
- CITATION TO SPOUSE IS TO BE ISSUED AT REQUEST OF ATTORNEY OF RECORD

STATEMENT OF PERMANENT ADDRESS

The following address is my permanent address. I understand that I am required to notify the Court of any change in my address and that the Court is authorized to remove me if I fail to comply with this requirement.

Signature, Attorney of Record

Print Attorney Name

Address

Phone Number

Ohio Supreme Court ID Number

Signature, Applicant

Print Name

Address

Phone Number

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

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION TO FILE DECEDENT'S WILL WITHOUT PROBATE

Applicant states that decedent died on _____

Decedent's domicile was _____
Street Address

City or Village, or Township if unincorporated area County

Post Office State Zip Code

Applicant further states that a written instrument purporting to be the Last Will and Testament of the above-named Decedent is being filed with this application, for record only, and not for admission to probate. Applicant asks that said instrument and related papers be filed with the permanent record of this Court, and that further proceedings be suspended until further Court Order.

Applicant Attorney for Applicant

Typed or Printed Name Typed or Printed Name

Address Address

Phone Number (include area code) Phone Number (include area code)

Supreme Court No. _____

ENTRY FILING DECEDENT'S WILL WITHOUT PROBATE

A written instrument purporting to be the Last Will and Testament of the above named Decedent has been filed for record with this Court. The Court finds that no application for admission to probate has been made and none need be filed. It is hereby ordered that said instrument and all papers relating thereto be filed, without probate, with the permanent files of this Court. It is further ordered that this proceeding be suspended until further Order of the Court.

Date

Judge Jack R. Puffenberger

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

ESTATE OF _____, DECEASED
CASE NO. _____

**SURVIVING SPOUSE, CHILDREN, NEXT OF KIN,
LEGATEES AND DEVISEES**
[R.C. 2105.06, 2106.13 AND 2107.19]

[Use with those applications or filings requiring some or all of the
information in this form, for notice or other purposes. Update as required.]

The following are decedent’s known surviving spouse, children, and the lineal descendants of deceased children.
If none, the following are decedent’s next of kin who are or would be entitled to inherit under the statutes of
descent and distribution.

Name	Residence Address	Relationship to Decedent	Birthdate of Minor
		Surviving Spouse	

- [Check whichever of the following is applicable]**
- The surviving spouse is the natural or adoptive parent of all of the decedent’s children.
 - The surviving spouse is the natural or adoptive parent of at least one, but not all of the decedent’s children.
 - The surviving spouse is not the natural or adoptive parent of any of the decedent’s children.
 - There are minor children of the decedent who are not the children of the surviving spouse.
 - There are minor children of the decedent and no surviving spouse.



CASE NO. _____

The following are the vested beneficiaries named in the decedent's will:

Name	Residence Address	Birthdate of Minor

[Check whichever of the following is applicable]

- The will contains a charitable trust or a bequest or devise to a charitable trust, subject to R.C. 109.23 to 109.41.
- The will is not subject to R.C. 109.23 to 109.41 relating to charitable trusts.

Date

Applicant (or give other title)

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

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION FOR SUMMARY RELEASE FROM ADMINISTRATION
[R.C. 2113.031]

Applicant states that decedent died on _____

Decedent's domicile was _____
Street address

City or Village, or Township if unincorporated area County

Post Office State Zip Code

[Check one of the following]

- The applicant is decedent's surviving spouse entitled to one hundred percent of the allowance for support and decedent's funeral and burial expenses have been prepaid or the surviving spouse has paid or is obligated in writing to pay decedent's funeral and burial expenses and the value of the assets does not exceed the \$40,000 allowance for support under R.C. 2106.13(B) plus an amount not exceeding \$5,000 for decedent's funeral and burial expenses.
- The applicant, who is not the surviving spouse, has paid or is obligated in writing to pay decedent's funeral and burial expenses and the value of the assets is the lesser of \$5,000 or the amount of decedent's funeral and burial expenses.

Attached hereto is a receipt, contract or other document that confirms the applicants payment or obligation to pay decedent's funeral and burial expenses or if the applicant is the surviving spouse, the prepayment receipt, if applicable.

The decedent's surviving spouse, next of kin, legatees and devisees known to applicant, are listed on attached Form 1.0.

Applicant states that there are no pending proceedings for the administration of decedent's estate or relief of decedent's estate from administration under R.C. 2113.03.

All known assets with date of death values of the estate are as follows:

- Motor Vehicles (include year, make, model, body type, manufacturer's vehicle identification number and Certificate of Title number)

\$ _____

\$ _____



CASE NO. _____

Accounts maintained by a Financial Institution (include financial institution name and the account's complete identifying number:

_____ \$ _____

_____ \$ _____

Stocks and bonds (include for each stock or bond its serial number, the name of its issuer, the name and address of its transfer agent, and the total number of shares of stock or bonds):

_____ \$ _____

_____ \$ _____

Real estate described in accompanying Form 12.0 Application for Certificate of Transfer and Form 12.1 Certificate of Transfer and date of death value. [**Attach verification of value**].

\$ _____

Other assets and date of death values

_____ \$ _____

_____ \$ _____

Total Assets \$ _____

Applicant requests an order granting summary release.

Attorney for Applicant

Applicant's Signature

Typed or Printed Name

Applicant's Typed or Printed Name

Street Address

Street Address

City State Zip Code

City State Zip Code

Phone Number (include area code)

Phone Number (include area code)

Attorney Registration No. _____

Signed and acknowledged by the applicant in my presence this ___ day of _____, 20__.

Notary Public/Deputy Clerk

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

ESTATE OF _____, DECEASED

CASE NO. _____

ENTRY GRANTING SUMMARY RELEASE FROM ADMINISTRATION
[R.C. 2113.031]

The Court finds that the application by _____, satisfies all requirements of R.C. 2113.031 and therefore summarily releases the estate from administration and directs:

- The delivery to the applicant of decedent's personal property set forth in the application with the title to that property.

- That Certificate(s) of Transfer, attached to the application, be issued.

A certified copy of this order together with a certified copy of the application for this order constitutes sufficient authority for a financial institution, corporation or other entity or person referred to in division (A) to (F) of Section 5731.39 of the Revised Code or for a clerk of a Court of Common Pleas to transfer title to the applicant of an asset of the decedent's estate listed in the application.

This order eliminates the need for a financial institution, corporation, or other entity or person to be provided a written consent of the tax commissioner prior to the delivery, transfer, or payment to the applicant of an asset of the decedent's estate listed in the application.

This order eliminates the duty of all persons to file an Ohio Estate Tax Return exclusively for the assets listed in the application.

Date

Judge Jack R. Puffenberger

