

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

**IN THE MATTER OF:** \_\_\_\_\_

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

**NEW CASE INFORMATION STATEMENT**

**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:**

- CORRECTION/REGISTRATION OF BIRTH     DISINTERMENT     TRUSTS     MINOR SETTLEMENT  
 NAME CHANGE  
 OTHER \_\_\_\_\_

---

---

**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

\_\_\_\_\_  
Signature, Fiduciary

\_\_\_\_\_  
Print Attorney Name

\_\_\_\_\_  
Print Fiduciary Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
( )  
Phone Number

\_\_\_\_\_  
( )  
Phone Number

\_\_\_\_\_  
Ohio Supreme Court ID Number

\_\_\_\_\_  
Ohio Supreme Court ID Number

\_\_\_\_\_  
E-Mail Address

\_\_\_\_\_  
E-Mail Address

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

**IN THE MATTER OF THE:**

**TESTAMENTARY TRUST**

**WRONGFUL DEATH TRUST**

**SPECIAL NEEDS TRUST**

**OTHER** \_\_\_\_\_

**OF** \_\_\_\_\_, **DECEASED, GRANTOR**

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

**TRUSTEE'S ACCOUNT**

[R.C 2109.30]

\_\_\_\_\_ Account  
From \_\_\_\_\_ to \_\_\_\_\_

Date 20 _____	(Balance from previous account or inventory) _____	Voucher No.	Receipts \$	Disbursements \$



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

**TRUSTEE'S ACCOUNT CONTINUATION PAGE**

\_\_\_\_\_ Account  
From \_\_\_\_\_ to \_\_\_\_\_

Date	Voucher No.	Receipts \$	Disbursements \$

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

**RECAPITULATION**

<b>Total Receipts</b> _____	\$ _____
<b>Total Disbursements</b> _____	\$ _____
<b>Balance Remaining in Trustee's Hands</b> _____	\$ _____

**ITEMIZED STATEMENT OF ALL REMAINING FUNDS, ASSETS AND INVESTMENTS**

<u>Item</u> _____	\$ _____
-------------------	----------

\_\_\_\_\_  
Attorney

\_\_\_\_\_  
Trustee

\_\_\_\_\_  
Supreme Court Registration No.

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Telephone Number (Include Area Code)

**ENTRY SETTING HEARING AND ORDERING NOTICE**



The Court sets \_\_\_\_\_ at \_\_\_\_\_ o'clock \_\_\_\_m. as the date and time for hearing the above accounting and orders notice of the hearing to be given as provided by law and Rules of Civil Procedure.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Judge Jack R. Puffenberger







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

**BANK CERTIFICATE**

N. B. Must be executed when funds are on deposit.

I HEREBY CERTIFY that the within named trustee, on the date stated below, had on deposit in

The \_\_\_\_\_ of \_\_\_\_\_, Ohio the sum  
of \$ \_\_\_\_\_ on \_\_\_\_\_ to the credit of the trust of  
\_\_\_\_\_ Nature of Deposit

\_\_\_\_\_ Bank  
Dated \_\_\_\_\_ By \_\_\_\_\_  
Cashier  
\_\_\_\_\_ Trustee

**BANK CERTIFICATE**

N. B. Must be executed when funds are on deposit.

I HEREBY CERTIFY that the within named trustee, on the date stated below, had on deposit in

The \_\_\_\_\_ of \_\_\_\_\_, Ohio the sum  
of \$ \_\_\_\_\_ on \_\_\_\_\_ to the credit of the trust of  
\_\_\_\_\_ Nature of Deposit

\_\_\_\_\_ Bank  
Dated \_\_\_\_\_ By \_\_\_\_\_  
Cashier  
\_\_\_\_\_ Trustee



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

TRUST OF \_\_\_\_\_

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

**ENTRY APPROVING AND SETTLING ACCOUNT**

Upon hearing the account filed on \_\_\_\_\_, the Court finds that:

**[Check whichever of the following are applicable]**

- The \_\_\_\_\_ partial account has been lawfully administered;
- The trust has been lawfully administered except for final distribution to the beneficiaries;
- The trust has been fully and lawfully administered and the assets have been distributed in accordance with the law or the applicable instruments governing distribution;
- The events have occurred after which the Court may approve and settle a final account.

The account is therefore approved and settled.

**[Check if applicable]**  The fiduciary and surety are discharged.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Judge Jack R. Puffenberger

**[Check whichever of the following are applicable]**

- This is the \_\_\_\_\_ current account.
- This is a final account of a (deceased) (removed) (resigned) trustee. The trust shall remain open.
- This is a final account of a beneficiary of a trust. The trust estate shall remain open for other beneficiaries of the trust.



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

IN THE MATTER OF THE TRUST OF \_\_\_\_\_  
CASE NO. \_\_\_\_\_

**AFFIDAVIT**

Now comes \_\_\_\_\_, **Trustee**, being first duly sworn according to law, deposes and states that the investments of this \_\_\_\_\_ are in compliance with **Ohio Revised Code sections 2109.37 – 2109.372.**

As **TRUSTEE**, I certify that unless otherwise provided by law or in the instrument creating the trust, at least 40% of the funds of this \_\_\_\_\_ are invested in those instruments under the **Ohio Revised Code sections 2109.37 (a)(1)–(17).**

**FURTHER AFFIANT SAYETH NAUGHT**

\_\_\_\_\_

Sworn to before me and subscribed in my presence this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Notary Public, State of Ohio



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

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

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

**CONFIDENTIAL DISCLOSURE OF PERSONAL IDENTIFIERS  
[Rule 45(D) of the Rules of Superintendence for the Courts of Ohio]**

	<b>Complete Personal Identifier</b>	<b>Institution</b>	<b>Abbreviation</b>	<b>Form No.</b>	<b>Filing Date</b>
Ex.	<u>123-45-6789</u>	<u>Social Security</u>	<u>6789</u>	<u>22.3</u>	<u>07/01/2009</u>
Ex.	<u>0001234567</u>	<u>Anytown Bank Checking</u>	<u>Anytown #1</u>	<u>6.1</u>	<u>07/01/2009</u>
1.	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____
4.	_____	_____	_____	_____	_____
5.	_____	_____	_____	_____	_____
6.	_____	_____	_____	_____	_____
7.	_____	_____	_____	_____	_____
8.	_____	_____	_____	_____	_____
9.	_____	_____	_____	_____	_____
10.	_____	_____	_____	_____	_____

Check if additional pages are attached.

\_\_\_\_\_  
Signature of Filing Party

\_\_\_\_\_  
Printed Name

Date: \_\_\_\_\_

This is page \_\_\_\_ of \_\_\_\_ pages

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

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

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

**BANK CERTIFICATE**

N.B. Must be executed when funds are on deposit.

**I HEREBY CERTIFY** that the within named fiduciary, on the date named below, had on deposit in

The \_\_\_\_\_ of \_\_\_\_\_, Ohio

The sum of \$ \_\_\_\_\_ on \_\_\_\_\_ to the credit of  
Nature of Deposit

\_\_\_\_\_.

Bank \_\_\_\_\_

Dated \_\_\_\_\_, 20 \_\_\_\_

By \_\_\_\_\_ Cashier

\_\_\_\_\_  
Fiduciary

**BANK CERTIFICATE**

N.B. Must be executed when funds are on deposit.

**I HEREBY CERTIFY** that the within named fiduciary, on the date named below, had on deposit in

The \_\_\_\_\_ of \_\_\_\_\_, Ohio

The sum of \$ \_\_\_\_\_ on \_\_\_\_\_ to the credit of  
Nature of Deposit

\_\_\_\_\_.

Bank \_\_\_\_\_

Dated \_\_\_\_\_, 20 \_\_\_\_

By \_\_\_\_\_ Cashier

\_\_\_\_\_  
Fiduciary

Attach to Trust Account form TST 25.5A

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.