

**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.:**

YES N/A

The account and all relevant forms are signed by the fiduciary and attorney

Any required bank statements, vouchers or receipts have been presented and totaled

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

Attorney fee application, contract, or computation with billing statement has been submitted and /or approved

Fiduciary fee application/ computation has been approved

Application to Extend Administration 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 has been filed

Verification is provided that bond has been filed and, 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 has filed election or the time for filing has passed

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.

Possible Shortage

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

YES N/A

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