

PROBATE COURT OF LUCAS COUNTY, OHIO

JACK R. PUFFENBERGER, JUDGE

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

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

ATTORNEY/FIDUCIARY INVENTORY CHECKLIST

In order for the Court to approve the above-referenced inventory, 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. **PLEASE ADDRESS EACH ITEM LISTED BY CHECKING EITHER YES OR N/A (NOT APPLICABLE).**

Yes N/A

- The Inventory and Appraisal, Schedule of Assets and Certificate of Service of Inventory to Heirs and Beneficiaries have been signed by the fiduciary and attorney (if any).
- An Order Approving Inventory and Appraisal is attached.
- The recapitulation on the Inventory and Appraisal matched the Schedule of Assets.
- All of decedent's probate assets, including real and personal property has been listed on the schedule of assets with date of death values.
- Any real estate listed includes the complete legal description, including parcel number.
- Any vehicles listed include make, model, year and VIN numbers for each vehicle.
- Asset valuations are attached, including Kelley Blue Book valuation, AREIS valuation or Appraisal or the Appraiser's Certificate on the 6.0 has been completed.
- If an appraisal is needed the Appointment of appraiser form has been filed and approved.
- Any accounts listed are identified by account numbers or a Confidential Disclosure of Personal Identifiers has been filed.
- Business valuation or appraiser has been included (if any).
- Any savings bonds listed are identified by serial number and value.
- Any assets transferred from a guardianship have been included.
- Any bond or additional bond needed has been filed.
- If this is a Successor Fiduciary account, the final account for the previous fiduciary has been filed and approved.
- I have listed any missing forms or documents below:

\_\_\_\_\_  
\_\_\_\_\_

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

I hereby certify that I have provided all the documentation, approvals, and forms required unless specifically noted above.

\_\_\_\_\_  
Attorney

\_\_\_\_\_  
Fiduciary

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

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

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

ESTATE OF \_\_\_\_\_, DECEASED

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

**INVENTORY AND APPRAISAL**

[R.C. 2115.02 and 2115.09]

To the knowledge of the fiduciary the attached schedule of assets in decedent's estate is complete. The fiduciary determined the value of those assets whose values were readily ascertainable and which were not appraised by the appraiser, and that such values are correct.

The estate is recapitulated as follows:

Tangible personal property .....	\$ _____
Intangible personal property .....	\$ _____
Real property .....	\$ _____
<b>Total</b> .....	<b>\$ _____</b>

Automobile transferred to surviving spouse  
Under R.C. 2106.18 ..... value \$ \_\_\_\_\_

Automobile transferred to surviving spouse  
Under R.C. 2106.18 ..... value \$ \_\_\_\_\_

Total value [not to exceed \$40,000.00] ..... \$ \_\_\_\_\_  
[not to exceed \$65,000.00 for dates of death on or after April 6, 2017]

Insofar as it can be ascertained, an Ohio Estate Tax Return will will not be filed.

The fiduciary is also the surviving spouse of the decedent and waives notice of the taking of the inventory.

\_\_\_\_\_  
Attorney

\_\_\_\_\_  
Fiduciary

Attorney Registration No. \_\_\_\_\_

**APPRAISER'S CERTIFICATE**

The undersigned appraiser agrees to act as appraiser of decedent's estate, and to appraise the property exhibited truly, honestly, impartially, and to the best of the appraiser's knowledge and ability. The appraiser further says that those assets whose values were not readily ascertainable are indicated on the attached schedule by a check in the "Appraised" column opposite each such item, and that such values are correct.

\_\_\_\_\_  
Appraiser

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

**WAIVER OF NOTICE OF TAKING OF INVENTORY**  
[R.C. 2115.04]

The undersigned surviving spouse hereby waives notice of the time and place of taking the inventory of decedent's estate.

\_\_\_\_\_  
Surviving Spouse

**WAIVER OF NOTICE OF HEARING ON INVENTORY**  
[Use when notice is required by the Court or deemed necessary by the fiduciary]

The undersigned, who are interested in the estate, waive notice of the hearing on the inventory.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**ENTRY SETTING HEARING**

The Court sets \_\_\_\_\_ at \_\_\_\_\_ o'clock \_\_\_\_ M., as the date and time for hearing the inventory of decedent's estate.

\_\_\_\_\_  
Date

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





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

ESTATE OF \_\_\_\_\_, DECEASED

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

**JUDGMENT ENTRY**  
(Inventory and Appraisal)  
Revised Code, Sec. 2115.29

---

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

**Order Approving Inventory and Appraisal**

This day the Inventory and Appraisal in the above captioned estate, heretofore filed herein, came on for hearing.

It appearing to the satisfaction of the Court that Notice of the filing of the said Inventory and Appraisal has been given to or waived by all interested parties, as required by law, and no exceptions having been filed thereto, it is now ordered that said Inventory and Appraisal after being duly examined, be allowed and confirmed.

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

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.



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

ESTATE OF \_\_\_\_\_, DECEASED  
CASE NO. \_\_\_\_\_

**CERTIFICATE OF SERVICE OF INVENTORY**  
**TO HEIRS OR BENEFICIARIES**

[R.C. 2115.16]

This is to certify that a true and accurate copy of the inventory was served on  
\_\_\_\_\_ upon all beneficiaries of the estate except:  
(Date)

The following heir or beneficiary whose address is unknown:

\_\_\_\_\_  
Attorney

\_\_\_\_\_  
Fiduciary

Attorney Registration No. \_\_\_\_\_