

PROBATE COURT OF LUCAS COUNTY, OHIO

JACK R. PUFFENBERGER, JUDGE

IN THE MATTER OF _____ CASE NUMBER _____

GUARDIAN'S ESTATE

ATTORNEY/GUARDIAN CHECKLIST

In order for the Court to approve the above-referenced account, the Guardian and attorney (if any) must certify that the following information has been provided and any additional requirements noted on the checklist have been addressed.:

YES N/A

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

Guardian Report, Plan and Statement of Expert Evaluation (if needed) have been filed as to the guardian of the person

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

All checks written have been cashed or cancelled (bank encoded)

Bank or other financial institution certification is attached

All assets remaining in the Guardian's hands have been itemized

Ending balance from previous accounts or inventory agree with beginning balance in present account

Recapitulation figures are completed and receipts and disbursements totals match the assets remaining (if any)

Attorney fee application, or computation has been submitted and /or approved

Guardian fee application/ computation has been approved

All disbursements have court approval

Verification 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

Affidavit Concerning Investments (if needed) is filed with the account

Shortage

If you are filing a Final Account:

Court costs have been paid in full

Any missing forms or documentation are listed below:

Submit any missing documents to 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.

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

Guardian

Email address

Email address