

**GEAUGA COUNTY PROBATE COURT
JUDGE TIMOTHY J. GRENDALL**

CHECKLIST - SUMMARY RELEASE OF ADMINISTRATION

These instructions are provided as a public service of the Geauga County Probate Court, are intended as a guideline only, and are not legal advice. Depending on the circumstances of each case, additional steps may be required that are not listed below. The clerks are not attorneys and therefore cannot answer legal questions or assist you in completing the forms or deciding which forms apply to your situation. The documents that you file must be typewritten, legible, and completed in their entirety. The clerks may refuse for filing illegible or incomplete documents. The Court recommends that you obtain legal advice from your attorney or obtain assistance from the Court's Help Center before preparing and filing any forms. You may make an appointment with the Help Center by calling 440-279-1834. If you decide to proceed without assistance from your attorney or from the Court's Help Center, then you should read the following Probate Information Sheets before taking any action:

- Probate Process Overview
- Summary Release from Administration
- Rights of Surviving Spouse
- Digital Assets

Filing Requirements

1. **Copy of Death Certificate** - (1) must redact the social security number and (2) must be shrunk to letter-size
 - **Form GC PF 4.52 - Residency Affidavit** - if the Decedent's address on the Death Certificate is not in Geauga County.
2. **Funeral Bill** - (1) must provide evidence (a) that the funeral bill was paid in full and (b) proof of payment by the applicant (e.g. cancelled check, receipt), or (2) if funeral bill is not due and owing (e.g. the funeral director was prepaid or the decedent's body was donated and cremation costs were paid by a third party), then provide satisfactory evidence establishing that fact.
3. **Form GC PF 5.12 - Application for Approval of Funeral Expense** - if necessary to recover non-funeral director funeral expenses as defined by R.C. 2113.031(A)(2)(b).
4. **Identification** - [if applicant is not represented by an attorney - see Geauga Probate Local Rule 78.10] (1) a government-issued photographic identification (e.g. a current driver's license or passport), and (2) evidence of current mailing address (e.g. recent utility bill, bank statement account, property tax bill, voter registration card).
5. **Form 1.0 Surviving Spouse, Children, Next of Kin, Legatees and Devisees** (no need to insert information on page 2 regarding beneficiaries)
6. **Form 5.10 Application For Summary Release From Administration** (must be notarized)
7. **Form 5.11 Entry Granting Summary Release From Administration**
8. **Form GC PF 6.5 - Digital Asset Certification**

9. Form GC PF 6.6 - Tangible Personal Property Certification

10. If probate property includes real property, then Forms 12.0 Application for Certificate of Transfer, 12.1 Certificate of Transfer, and 12.2 Order Issuing Certificate of Transfer.
11. **Court Cost Deposit** - arrange for payment of court cost deposit. See the "Probate Court Costs" on the Court's website.

Additional Notes

- Evidence of Assets and Value - present to the clerks evidence of assets and date of death value
 - if vehicle, then copy of certificate of title and Kelley Blue Book Value (or other acceptable evidence of value).
 - if financial accounts, then copy of financial statement nearest date of death.
 - If stocks or bonds (not listed on a financial/brokerage account), then the total number of the shares and bonds and their total date of death value and, for each share or bond, its serial number, the name of its issuer, its date of death value, and, if any, the name and address of its transfer agent.
 - If real estate, then a copy of the deed, and a copy of the Auditor's property record (e.g. most recent real estate tax bill, Geauga REALink).
- Personal Identifiers See Geauga Probate Local Rule 57.2(C). Do not insert protected personal identifiers into a court document. If ordered by the Court, prepare and file form GC PF 45.0 - Confidential Disclosure of Personal Identifiers. However, with respect to financial accounts that have a unique account number, you should include the last four digits in the description of each such account on Form 5.10 Application For Summary Release From Administration - see Geauga Probate Local Rule 78.1(F).
- Determine Probate Assets - determine all of Decedent's probate property (see Probate Information Sheet-Probate Process Overview), including whether Decedent has (i) any right to unclaimed funds (see Ohio Division of Unclaimed Funds), (ii) a safe deposit box, (iii) tax refunds, (iv) unpaid wages, and (v) security deposit.
- Reduction of Allowance for Support. If applicable, determine whether the Allowance for Support must be reduced as required by R.C. 2106.13(C) by reason of the value of a vehicle selected by the surviving spouse under R.C. 2106.18.
- Decedent's Name - insert the decedent's name first, as shown on the death certificate, in all court documents, and insert next any other name as shown on the probate assets (e.g. certificate of title or financial account statement) - see Geauga Probate Local Rule 78.5(A)(8).
- Decedent Died with Will - no need to file application to admit Will to probate, but you may deposit the Will with the Court.
- Additional Funeral Expenses - If the applicant desires a court order to include funeral and burial expenses that are not included in the funeral director's invoice, then prepare and file with the Court form GC PF 5.12 - Application for Approval of Funeral Expenses.

- Attorneys' Fees - If attorneys fees are to be paid from the probate assets, then the attorney must prepare and file a motion to approve such fees, providing detail required by Geauga Probate Local Rule 71.1 and obtain a court order approving the fees.
- Appraisal - If probate property must be appraised and the applicant desires a court order waiving appraisal, then prepare and file with the Court form GC PF 3.2 - Application to Dispense with Appraisement.