

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

CHECKLIST - INVENTORY AND APPRAISAL

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 Sheet and Geauga Probate Local Rule before taking any action:

- Full Administration
- Geauga Probate Local Rule 78.5(D)(1)

Appraisal Requirements Before filing the Inventory and Appraisal, the Fiduciary must determine to what extent the probate property must be appraised and who should do the appraisal if required – see R.C. §§ 2115.02 and 2115.06. Before or together with the filing of Form 6.0 Inventory and Appraisal, the Fiduciary shall file either (1) Form 3.0 – Appointment of Appraiser or (2) Form GC PF 3.1 – “Application for Order Dispensing with Appraisement,” or both such forms when appropriate. Note that Form GC PF 3.1 – “Application for Order Dispensing with Appraisement” must be filed even if all probate property has a readily ascertainable value.

Filing Requirements

1. **Form 6.0 Inventory and Appraisal**
2. **Form 6.1 Schedule of Assets**
3. **Form 6.2 Waiver of Notice of Hearing on Inventory** (for those Interested Parties who did not sign that Waiver on Form 6.0, “Form 6.2 Waiver of Notice of Hearing on Inventory” may be filed after filing the Inventory and Appraisal but no less than five Calendar Days before the Hearing Date).
4. **Form GC PF 6.5 – Digital Asset Certification** (if not previously filed)
5. **Form GC PF 6.6 – Tangible Personal Property Certification** (if not previously filed)

Additional Notes

- 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 the Inventory - see Geauga Probate Local Rule 78.1(F).

- Evidence of Ownership and Value of Probate Property
 - Real Estate - see Geauga Probate Local Rule 78.5(D)(1). Attach to the Inventory and Appraisal (i) copy of the street address and legal description, including the permanent parcel number, and (ii) if not appraised, then a copy of evidence of value that conforms to Geauga Probate Local Rule 78.5(D)(1)(a)(2)(a)(e.g. County Auditor's most recent tax value).
 - Vehicles - see Geauga Probate Local Rule 78.5(D)(1). Attach to the Inventory and Appraisal (i) a copy of certificate of title and (ii) if not appraised, then a copy of evidence of value that conforms to Geauga Probate Local Rule 78.5(D)(1)(a)(2)(b) (e.g. Kelley Blue Book).
- Notice of Hearing on Inventory - see Geauga Probate Local Rule 78.5(D)(1)(d). If Notice of Hearing on Inventory is required, then use "Form 6.3 - Notice of Hearing on Inventory" and deliver it no less than 10 Calendar Days before the Hearing Date and provide the Court with Proof of Service in the manner provided in Geauga Probate Local Rule 78.13.
- Spousal Notice of Making the Inventory - if notice must be provided to the surviving spouse as required under R.C. 2115.04, then prepare and file with the Court form "GC PF 6.3A - Spousal Notice of Making the Inventory," and provide the Court with Proof of Service in the manner provided in Geauga Probate Local Rule 78.13.
- Supplemental Schedule of Assets - note that the Court may require the filing of a Supplemental Schedule of Assets regarding Digital Assets or Tangible Personal Property. In that case prepare and file with the Court form "GC PF 6.1A - Supplemental Schedule of Assets."
- Application to Extend Time for Filing Inventory – If additional time is required to file the Inventory and Appraisal, then file with the Court form "GC PF 41.4 – Application to Extend Time - Non-Litigation."