

IN THE COURT OF COMMON PLEAS, PROBATE DIVISION, GEauga COUNTY, OHIO
Judge Timothy J. Grendell

Information Sheet
Rights of Surviving Spouse (and Minors)

WARNING

This Information Sheet is intended to provide you with a brief overview of the subject matter. It may not provide you with all information that you require to be fully informed of the law that is applicable to your case. Additionally, the information may not accurately describe the pertinent sections of the Ohio Revised Code that are referenced in the footnotes. You should read those sections that are referenced. The Ohio Revised Code has a link on the Court's website. Additionally, you should consider reading those sections that are footnoted using "Page's Ohio Revised Code Annotated," which can be found at the Geauga County Law Library in the basement of the Courthouse at 100 Short Ct. Street, Chardon, Ohio 44024. Page's Ohio Revised Code Annotated also will provide you a summary of applicable court decisions (known as "case law"). While the Help Center can provide you with a limited amount of information, the Help Center staff cannot provide you with legal advice, and this Information Sheet is not intended to provide you with legal advice that is applicable to your case. You must decide how to best use the information provided. In the footnotes you will see a reference such as "R.C. 2106.18." That refers to Ohio Revised Code Section 2106.18, which is found in R.C. Title 21, and in R.C. Chapter 2106.

If a Decedent is survived by a spouse or minor children, then the surviving spouse and minor children have certain rights that are superior to the claims of many creditors and superior to those of other beneficiaries under the Decedent's Will, or next-of-kin if the Decedent dies without a valid Will. The Estate Representative¹ must account for the rights of a surviving spouse before paying creditors (who have properly presented their claims), and before making distributions in accordance with the Decedent's Will or the Statute of Descent and Distribution.² Please read the "Summary of General Rights of Surviving Spouse (Form 8.3) on the Court's website. The following provides additional information.

Transfer of Automobiles³

If the Decedent owned one or more automobiles that are Probate Property, and which are not specifically disposed of by the Will, then the surviving spouse may select and take title to those automobiles to the extent that the aggregate value of those automobiles do not exceed

¹ "Estate Representative" means a person appointed as the Executor, Administrator, or an applicant for a Release from Administration or Summary Release from Administration.

² R.C. 2105.06

³ R.C. 2106.18

\$65,000.⁴ If the surviving spouse selects one or more of those automobiles, then those selected automobiles are not considered Probate Property and the Estate Representative need not list those automobiles as probate property in the Inventory and Appraisal.⁵ Furthermore, that right to select automobiles is superior to any claims of creditors. However, there are other key points to consider:

- Any automobile owned by the Decedent, which passes to the surviving spouse by reason of a right of survivorship as provided for in the car title, is in addition to the right to select one or more automobiles under R.C. 2106.18.⁶
- An automobile that is so selected remains subject to any liens against the automobile, and the rights of the secured creditor, even if that creditor did not properly present its claim.⁷
- The surviving spouse can cause the transfer of a motor vehicle title by presenting to the BMV the death certificate and the certificate of title.

Right to Purchase Watercraft or Outboard Motor⁸

The surviving spouse may be entitled to receive one watercraft and one outboard motor, not specifically bequeathed under the Decedent's Will, that would otherwise be included in the probate estate. The surviving spouse should carefully follow the provisions in R.C. 2106.19.

Allowance for Support⁹

If a Decedent is survived by (1) a spouse, (2) a spouse and one or more minor children, or (3) no spouse but one of more minor children, then the spouse or the minor children are entitled to receive from the probate estate, and before any payment to most creditors, probate property in the aggregate value of \$40,000 (known as the Allowance for Support).¹⁰ If there is a surviving spouse, and all of the decedent's minor children are children of that spouse, then the Estate Representative shall distribute 100% of the Allowance for Support to the spouse. In a full administration the Estate Representative must obtain a court order to pay the family allowance by preparing and filing with the Court the form titled "Application for Family Allowance" (Form 7.1). However, the Estate Representative need not file an "Application for Family Allowance" (Form 7.1) in a Release from Administration.

If none of the Decedent's minor children are children of that spouse, then the Judge shall determine how the Allowance for Support is allocated among the spouse and those minor children who are not children of that spouse. Likewise, if there is no surviving spouse, but minor

⁴ R.C. 2106.18(A) and 4505.10. "automobile" includes a motorcycle and includes a truck if the truck was used as a method of conveyance by the deceased spouse or the deceased spouse's family when the deceased spouse was alive.

⁵ See generally probate information sheet "Full Administration."

⁶ R.C. 2131.12 and 2131.13

⁷ See generally probate information sheet "Creditor Rights."

⁸ R.C. 2106.19

⁹ R.C. 2106.13

¹⁰ R.C. 2106.13

children of the Decedent survive, then the Judge shall determine how the Allowance for Support is allocated among those minor children.¹¹

Note: The Estate Representative should prepare and file with the Court the form titled “Application for Apportionment of Family Allowance” (Form 7.2) to obtain a court order for distribution.

There are other key points to consider:

- If the surviving spouse selected one or more automobiles under R.C. 2016.18, then the Allowance for Support (that is - \$40,000) is reduced by the value of the automobile so selected with the lowest value.¹²
- If the surviving spouse received a motor vehicle by right of survivorship under R.C. 2131.12 or 2131.13, then the value of that motor vehicle does not reduce the amount of the Allowance for Support because those automobile(s) are not Probate Property and not part of the probate estate.¹³
- If the probate court must allocate the allowance for support, the administrator or executor, within five months of the initial appointment of an administrator or executor, shall file with the Court an “Application for Apportionment of Family Allowance” (Form 7.2).¹⁴
- If the surviving spouse is a competent adult, then the surviving spouse may waive the family allowance.¹⁵

Note: The Estate Representative should use GC PF 7.3 “Waiver of Spousal Rights of Family Allowance” if the surviving spouse desires to waive the rights of Family Allowance.

Right to Remain in Mansion House¹⁶

The surviving spouse may elect to remain in the mansion house (the family residence), free of charge, for one year if the mansion house is Probate Property. However, the Estate Representative may sell the mansion house to pay creditor claims, in which case the surviving spouse shall be paid from the sale proceeds a sum equal to the fair rental value of the remaining term.¹⁷

¹¹ R.C. 2106.13(B) and (C)

¹² R.C. 2106.13(A)

¹³ “Motor vehicle” includes manufactured homes, mobile homes, recreational vehicles, and trailers and semitrailers whose weight exceeds four thousand pounds. The value of the vehicle is the value that the spouse uses on the affidavit required by the BMV under R.C. 4505.10(B).

¹⁴ R.C. 2106.13(D).

¹⁵ R.C. 2106(E).

¹⁶ R.C. 2106.15

¹⁷ R.C. 2106.15. See generally R.C. 2106.10(F) for a definition of the “mansion house,” which states “the mansion house includes the decedent’s title in the parcel of land on which the house is situated and, at the option of the surviving spouse, the decedent’s title in the household goods contained within the house and the lots or farmland adjacent to the house and used in conjunction with it as the home of the decedent.”

Election to Receive the Mansion House¹⁸

A surviving spouse may elect to receive the Decedent's entire interest in mansion house (including household goods) as part of the spouse's rights for Allowance for Support and the spouse's right to Elect to Take Against the Will (explained below). The Decedent's interest shall be valued at the appraised value, as adjusted for any liens. The spouse must exercise the election before the final account is filed if the probate estate is handled as a Full Administration. If the probate estate is handled as a Release from Administration or a Summary Release from Administration, then the spouse must make the election at or before the court order granting the Release or Summary Release. If the spouse desires to make the election, then the spouse must inform the Estate Representative, and then the Estate Representative shall complete the transfer of title as specified in R.C. 2016.10(C).¹⁹

Right to Purchase Probate Property²⁰

If the mansion house is not specifically given to a beneficiary under the Will, then, regardless of any provision in the Decedent's Will to the contrary, the spouse has the right to purchase the Decedent's interest in the mansion house at the appraised value. Likewise, to the extent that other Probate Property is not specifically given to a beneficiary under the Will, then the spouse has the right to purchase such Probate Property, both real and personal property, for the appraised value. The spouse shall exercise the right to purchase by filing an application or Complaint with the Court no sooner than the filing of the Inventory and Appraisal, nor later than one month after the approval of the Inventory and Appraisal. The spouse must follow the rules set forth in R.C. 2106.16.

Right to Place Charge on Real Estate²¹

If no Will is admitted to probate and there are insufficient assets to pay the specific monetary share due to the surviving spouse pursuant to R.C. 2106.05 (the "Allowance for Support"), then the surviving spouse may place a charge (lien) on any real property included in the Probate Property in the amount of the unpaid portion of the specific monetary share.

Election to Take Against Will²²

A primary purpose of a Will is to allow the Decedent to decide who will receive his or her Probate Property after the payment of expenses, costs, fees, and valid creditor claims, and rights of the surviving spouse (or minor children), which the Estate Representative has a duty to pay or satisfy.²³ If the Decedent dies without a valid Will (or to the extent the Will does not fully dispose of all Probate Property), then the State of Ohio decides who will receive that Probate Property, as set forth in R.C. 2105.06, known as the "Statute of descent and distribution". Under that Section, a surviving spouse has significant rights, as a next-of-kin, to receive a share of the Probate Property, as more fully explained in the Information Sheet "Probate Process Overview." Any person has the right to execute a Will that makes no provision for the spouse, children, or

¹⁸ R.C. 2106.10

¹⁹ See generally the form titled "Application for Certificate of Transfer" (Form 12.0)

²⁰ R.C. 2106.16

²¹ R.C. 2106.11

²² R.C. 2106.01 to 2106.08

²³ See generally probate information sheet "Probate Process Overview" for a description of Probate Property.

any other relative. For example, a person may decide to execute a Will that gives all Probate Property to a charity.

However, the primary purpose of R.C. 2106.01 is to provide some protection for a spouse who is disinherited in the Decedent's Will. Thus, if the probate estate is handled as a Full Administration, then the surviving spouse is given an election to take that portion of the Probate Property as provided for in "Statute of Descent and Distribution," rather than under the provisions, if any, given to the surviving spouse in the Decedent's Will. A surviving spouse must consider both R.C. 2105.06 and 2106.01, and the forms titled "Election of Surviving Spouse to Take under Will (Form 8.1) and "Election of Surviving Spouse to Take Against Will" (Form 8.2).

After the appointment of the Executor or Administrator, the Court will issue to the surviving spouse a citation advising the spouse of his or her rights.²⁴ The Court will attach a "Summary of General Rights of Surviving Spouse (Form 8.3). A surviving spouse may waive service of that citation by filing with the Court a waiver, using the form titled "Waiver of Service to Surviving Spouse to the Citation to Elect" (Form 8.6).

Right to Reimbursement of Funeral Bill.²⁵

The surviving spouse may be entitled to reimbursement for the payment of the funeral bill under R.C. 2106.20.

Right to Contest Antenuptial or Premarital Agreement.²⁶

If before the marriage, the Decedent and the surviving spouse entered into a contract, commonly known as an antenuptial or premarital agreement, then the surviving spouse may have waived one or more of the spousal rights described above. However, the surviving spouse may contest any antenuptial or premarital agreement, provided that the action to contest is commenced within four months after the appointment of the Executor or Administrator of the estate of the Decedent.

Right of Inheritance.²⁷

If the Decedent died without a valid Will, then the surviving spouse has rights of inheritance under R.C. 2105.06,²⁸ depending upon whether the Decedent has surviving children.

- (1) Under R.C. 2105.06(B), if all of the Decedent's children (and their lineal descendants) are the children of the surviving spouse, then the surviving spouse receives all of the Probate Property.
- (2) Under R.C. 2105.06(C), if the Decedent had only one surviving child (or a lineal descendant(s) of that child if the child does not survive), and that child is not the child of the surviving spouse, then (1) the first \$20,000 of the Probate Property is paid to the surviving spouse, and (2) the remainder of the Probate Property is distributed by

²⁴ Known as a the form titled "Citation to Surviving Spouse to Exercise Elective Rights" (Form 8.0).

²⁵ R.C. 2106.20

²⁶ R.C. 2106.22

²⁷ R.C. 2105.06

²⁸ R.C. 2105.06(B), (C), and (D) set forth the surviving spouse's right to inherit if there is no valid Will.

50% to the surviving spouse and the remainder to the sole surviving child (or if that child does not survive then per stirpes to surviving lineal descendant(s) of that child).

(3) Under R.C. 2105.06(D), if the Decedent had more than one surviving child (or a lineal descendant), then

- a. the first \$60,000 of the Probate Property is paid to the surviving spouse if the spouse is the parent of at least one of those children, or
- b. the first \$20,000 of the Probate Property is paid to the surviving spouse if the spouse is not the parent of any of those children, and

the remainder of the Probate Property is distributed by 1/3 of the balance of the Probate Property to the surviving spouse and the balance of the Probate Property equally to the surviving children (or if a child does not survive then per stirpes to the surviving lineal descendant(s) of that child).

REQUIREMENT TO TIMELY EXERCISE ELECTIONS.²⁹

All the Spousal Rights set forth above are granted under R.C. Chapter 2106. R.C. 2106.25 provides that if a surviving spouse desires to exercise any election described under R.C. Chapter 2106, then, unless otherwise specified in R.C. Chapter 2106, the surviving spouse must exercise the election in a manner that complies with law within five months after the appointment of the Estate Representative. If a surviving spouse desires to make any elections discussed in this Information Sheet, then the spouse should consider obtaining legal advice to assist with the process of making the election.

LEGAL PRACTICE IN THE PROBATE COURT IS RESTRICTED BY LAW TO ATTORNEYS WHO ARE LICENSED BY THE SUPREME COURT OF OHIO AND INDIVIDUALS WHO ARE HANDLING THEIR OWN LEGAL MATTERS. IF AN INDIVIDUAL WISHES TO HANDLE HIS OR HER OWN CASE, THAT PERSON MAY ATTEMPT TO DO SO, HOWEVER DUE TO THE COMPLEXITY OF THE LAW AND THE DESIRE TO AVOID COSTLY ERRORS, MANY PERSONS WHO HAVE MATTERS BEFORE THE COURT ARE REPRESENTED BY AN ATTORNEY.

IF YOU CHOOSE TO REPRESENT YOURSELF AND USE THE COURT'S FORMS, BE AWARE THAT STATE LAW PROHIBITS THE JUDGE, MAGISTRATE, AND EMPLOYEES OF THE GEauga COUNTY PROBATE COURT, INCLUDING THE HELP CENTER STAFF, FROM PROVIDING YOU WITH LEGAL ADVICE. IF YOU NEED LEGAL ADVICE, THEN YOU SHOULD CONTACT AN ATTORNEY OF YOUR CHOOSING.

²⁹ R.C. 2106.25