

PROBATE COURT OF SUMMIT COUNTY, OHIO
ELINORE MARSH STORMER, JUDGE

IN THE MATTER OF _____ CASE NO. _____

ATTORNEY/FIDUCIARY INVENTORY CHECKLIST

In order for the Court to accept 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:

YES NA

- | | | |
|--------------------------|--------------------------|---|
| ☐ | ☐ | Signatures on all submitted forms by Fiduciary, Attorney if represented, and the Surviving Spouse on the Waiver of Taking of Inventory |
| ☐ | ☐ | Itemization of assets contains the following: |
| | ☐ | Real estate value is supported by auditor's card or an appraisal if an appraiser has been appointed. The real estate must also be described by the physical address as well as the legal description. |
| | ☐ | All motor vehicles, watercraft, motorcycles, and trailers must be described by their year, make, model, VIN, as well as a value supported by the Kelly Blue Book Value. |
| | ☐ | Financial accounts must be identified by the financial institution, type of account, last 4 digits of the account number and date of death value. |
| | ☐ | Savings Bond value must be supported with a print out for the date of death value from the treasury website or a redacted copy of each bond. |
| | ☐ | Specific Bequests must be addressed on the inventory as still in existence and listed as part of the assets, previously distributed, or no longer in existence. |
| ☐ | ☐ | The recapitulation on the Inventory and Appraisal matches the Schedule of Assets |
| ☐ | ☐ | If this is a successor case Inventory, the final account for the previous fiduciary has been filed and approved. |
| ☐ | ☐ | Any bond or additional bond needed has been filed. |

I have listed any missing forms or documents below:

Missing forms or documents may be sent to efiling@summitohioprobate.com

I hereby certify that I have provided all of the documentations, approvals, forms and required court cost payments unless specifically noted above.

Attorney Signature

Fiduciary Signature

Type or Print Attorney Name

Type or Print Fiduciary Name