

SUMMARY ESTATES

ENCLOSED IS A PACKET OF FORMS THAT YOU WILL NEED TO COMPLETE. IN ADDITION TO THE COMPLETED FORMS YOU WILL NEED THE FOLLOWING:

- * Original Will (If the decedent had one)
- * Death Certificate
- * Paid funeral receipt that shows who paid the funeral or a copy of the contract signed by the person who is responsible to pay for the funeral.
- * Proof of the asset such as a bank statement or vehicle title
- * Appraisal or documentation to verify the value of real estate and tangible property such as a car.
- * Filing fee in the amount of \$ 141 .

**Birthdate
of minor**

[illegible]

- ☐ The will contains a charitable trust or a bequest or devise to a charitable trust, subject to R.C. 109.23 and to 109.41.
- ☐ The will is not subject to R.C. 109.23 to 109.41 relating to charitable trusts.

Applicant (or give other title)

PROBATE COURT OF STARK COUNTY, OHIO

CURT WERREN, JUDGE

ESTATE OF _____, **DECEASED**

CASE NO. _____

APPLICATION FOR SUMMARY RELEASE FROM ADMINISTRATION

[R.C.2113.031]

Applicant states that decedent died on _____.

Decedent's domicile was _____.

Street Address

City or Village, or Township if unincorporated area

County

Post Office

State

Zip Code

[Check one of the following]

- ☐ The applicant is decedent's surviving spouse entitled to one hundred percent of the allowance for support and decedent's funeral and burial expenses have been prepaid or the surviving spouse has paid or is obligated in writing to pay decedent's funeral and burial expenses and the value of the assets does not exceed the \$40,000 allowance for support under R.C. 2106.13(B) plus an amount not exceeding \$5,000 for decedent's funeral and burial expenses.
- ☐ The applicant, who is not the surviving spouse, has paid or is obligated in writing to pay decedent's funeral and burial expenses and the value of the assets is the lesser of \$5,000 or the amount of decedent's funeral and burial expenses.

[Check if applicable]

- ☐ Decedent was fifty-five (55) years of age or older at the time of death and was a recipient of medical assistance under Chapter 5111 of the Revised Code. SPF 7.0 - Notice to Administrator of Estate Recovery Program has been filed.

Attached hereto is a receipt, contract or other document that confirms the applicant's payment or obligation to pay decedent's funeral and burial expenses or if the applicant is the surviving spouse, the prepayment receipt, if applicable.

The decedent's surviving spouse, next of kin, legatees and devisees known to applicant, are listed on attached Form 1.0.

Applicant states that there are no pending proceedings for the administration of decedent's estate or relief of decedent's estate from administration under R.C. 2113.03.

All known assets with date of death values of the estate are as follows:

- ☐ Motor Vehicles (include year, make, model, body type, manufacturer's vehicle identification number and Certificate of Title number)

\$

\$

CASE NO. _____

☐ Accounts maintained by a Financial Institution (include financial institution name and the account's complete identifying number):

_____ \$
_____ \$

☐ Stocks and Bonds (include for each stock or bond its serial number, the name of its issuer, the name and address of its transfer agent, and the total number of shares of stocks or bonds):

_____ \$
_____ \$

☐ Real estate described in accompanying Form 12.0 Application for Certificate of Transfer and Form 12.1 Certificate of Transfer and date of death value. **[Attach verification of value.]** \$ _____

☐ Other assets and date of death values: _____ \$

Total Assets \$ _____

Applicant requests an order granting summary release.

Attorney for Applicant

Applicant's Signature

Typed or Printed Name

Applicant's Typed or Printed Name

Street Address

Street Address

City State Zip Code

City State Zip Code

Phone Number (include area code)

Phone Number (include area code)

Attorney Registration No. _____

Signed and acknowledged by the applicant in my presence this _____ day of _____, _____.

Notary Public/Deputy Clerk

PROBATE COURT OF STARK COUNTY, OHIO

IN THE MATTER OF: _____

CASE NO. _____

Confidential Disclosure of Personal Identifiers

[Rule 45(D) of the Rules of Superintendence for the Courts of Ohio]

	<u>Complete Personal Identifier</u>	<u>Institution</u>	<u>Abbreviation</u>	<u>Form No.</u>	<u>Filing Date</u>
Ex.	123-45-6789	Social Security	6789	22.3	7/1/2009
Ex.	0001234567	Anytown Bank Checking	Anytown #1	6.1	7/1/2009
1.	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____
4.	_____	_____	_____	_____	_____
5.	_____	_____	_____	_____	_____
6.	_____	_____	_____	_____	_____
7.	_____	_____	_____	_____	_____
8.	_____	_____	_____	_____	_____
9.	_____	_____	_____	_____	_____
10.	_____	_____	_____	_____	_____

Check if additional pages are attached

Signature of Filing Party

Printed Name

Date: _____

This is page ____ of ____ pages

**PROBATE COURT OF STARK COUNTY, OHIO
CURT WERREN, JUDGE**

ESTATE OF _____, DECEASED

CASE NO. _____

**ENTRY GRANTING SUMMARY RELEASE FROM ADMINISTRATION
[R.C. 2113.031]**

The Court finds that the application by _____, satisfies all requirements of R.C. 2113.031 and therefore summarily releases the estate from administration and directs:

- ☐ The delivery to the applicant of decedent's personal property set forth in the application with the title to that property.
- ☐ That Certificate(s) of Transfer, attached to the application, be issued.

A certified copy of this order together with a certified copy of the application for this order constitutes sufficient authority for a financial institution, corporation or other entity or person referred to in division (A) to (F) of Section 5731.39 of the Revised Code or for a clerk of a Court of Common Pleas to transfer title to the applicant of an asset of the decedent's estate listed in the application.

This order eliminates the need for a financial institution, corporation, or other entity or person to be provided a written consent of the tax commissioner prior to delivery, transfer, or payment to the applicant of an asset of the decedent's estate listed in the application.

This order eliminates the duty of all persons to file an Ohio Estate Tax Return exclusively for the assets listed in this application.

Date

Curt Werren,
Probate Judge