

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

TRUST UNDER WILL OF: _____

CASE NO. _____

APPLICATION TO DEPOSIT PERSONAL PROPERTY IN LIEU OF BOND
AND FOR AUTHORITY TO INVEST FUNDS

Now comes _____, the duly appointed, qualified and acting trustee of the Trust created under the Last Will and Testament of _____, and represents to the Court that, in determining the amount of bond to be required of him as such trustee, the value of the estate or fund coming into his hands is such that it is deemed inexpedient to require security in the full amount prescribed by law.

Your applicant further represents to the Court that there is a part of the estate or fund, as set forth in Exhibit A attached hereto and hereby incorporated herein, which he desires to deposit with the _____, an institution authorized as:

- ☐ a bank
- ☐ a building and loan association
- ☐ a savings and loan association
- ☐ a trust company

under the laws of:

- ☐ the State of Ohio
- ☐ the United States of America

and thereby qualified to serve as depository under the provisions of Ohio Revised Code Section 2109.13.

Your applicant therefore prays that the Court direct the deposit of that part of the estate or fund described in Exhibit A with _____, and that after the filing of the receipt with this Court for such part of the estate or fund executed by such depository, acknowledging that such assets are held by it, subject to the order of this Court, that this Court may fix the amount of the bond required to be given by your applicant, with respect to the value of the remainder only of the estate or fund.

Your applicant further states that it is to the advantage of the trust to order such deposit according to the law with such depository, to the end that your applicant's bond may be kept at a minimum, and that the trust presently consists of property to wit:

- | | | |
|-----|---------------------------------------|----------|
| (a) | Real estate presently valued at | \$ _____ |
| (b) | Personal property presently valued at | \$ _____ |
| (c) | Personal property to depository | \$ _____ |
| (d) | Personal property with fiduciary | \$ _____ |

CASE NO. _____

Your applicant further states that it is to the advantage of the trust to grant authority to him as trustee to instruct such depository to invest and reinvest the personal property deposited pursuant hereto in accordance with the investment powers and limitations set forth in Sections 2109.37 and 2109.371 of the Ohio Revised Code, without obtaining additional orders of the Court authorizing specific future purchases and sales, and to authorize the depository to carry out such investment instructions.

Wherefore, your applicant respectfully requests that this Court grant him its order setting the amount of his bond at \$ _____, authorizing and directing the deposit of that part of the estate or fund described in the attached Exhibit A, with _____, authorizing him to instruct the depository to invest and reinvest the personal property deposited hereunder pursuant to Section 2109.37 and 2109.371, or within the investment directions of the trust, without obtaining additional orders of the Court authorizing specific future purchases and sales, and authorizing the depository to carry out such investment instructions.

Attorney for Trustee

Trustee

Typed or Printed Name

Typed or Printed Name

Address

Address

Phone Number (include area code)

Phone Number