

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

IN THE MATTER OF _____ CASE NO. _____

DECEDENT'S ESTATE

ATTORNEY/FIDUCIARY ACCOUNT CHECKLIST

In order for the Court to accept the above-referenced account, 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

- | | | |
|--------------------------|--------------------------|---|
| ☐ | ☐ | The prior inventory/accounting has been approved |
| ☐ | ☐ | The account and all relevant forms are signed by the fiduciary and attorney |
| ☐ | ☐ | Application for Attorney Fees/ Consents to Attorney Fees is included |
| ☐ | ☐ | Computation Schedule for Administrator/Executor Fees is included |
| ☐ | ☐ | Ending balance from previous account matches the beginning balance in present account |
| ☐ | ☐ | All assets are listed as on the prior inventory/account along with all receipts from this accounting period |
| ☐ | ☐ | All disbursements made during this accounting period are listed |
| ☐ | ☐ | If real estate was sold a complete copy of the settlement statement is attached to the account |
| ☐ | ☐ | Any distributions to minors or wards have been either:
☐ Deposited in a Guardianship Estate
☐ Distributed pursuant to a court order |
| ☐ | ☐ | All Assets remaining in the fiduciary's hands are itemized |
| ☐ | ☐ | If filing a Partial Account, a bank statement for this accounting period is included |
| ☐ | ☐ | If filing a Final Account, a copy of the paid funeral bill is included or has been filed |
| ☐ | ☐ | If filing a Final Account, all creditor claims have been rejected, paid or compromised |
| ☐ | ☐ | Recapitulation figures are completed and receipts and disbursements totals match the assets remaining |
| ☐ | ☐ | Court Costs have been paid in full |

CASE NO. _____

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

Type or Print Attorney Name

Email address

Fiduciary Signature

Type or Print Fiduciary Name

Email address