

PROBATE COURT OF CUYAHOGA COUNTY, OHIO

ANTHONY J. RUSSO, Presiding Judge

LAURA J. GALLAGHER, Judge

IN THE MATTER OF THE

WRONGFUL DEATH TRUST 2111.182 TRUST SPECIAL NEEDS TRUST

OF _____, DECEASED/GRANTOR

FBO _____, BENEFICIARY

CASE NUMBER _____

APPLICATION FOR APPOINTMENT OF TRUSTEE

_____ hereby make(s) application to be appointed Trustee(s) of the:

- Wrongful Death Trust fbo _____ as the result of the death of _____, Estate case number _____;
 R.C. 2111.182 Trust created by _____ on _____ Month, Day, Year;
 Special needs Trust created by _____ on _____ Month, Day, Year

and states that the estimated property of said trust estate, is as follows:

Personal Property.....\$ _____
Real Estate.....\$ _____
Annual Rentals.....\$ _____
Totals.....\$ _____

and states that:

- Bond is dispensed with by the instrument;
 Bond is dispensed with by law (100% Custodial);
 Bond in the sum of \$ _____ is attached;

Attorney Signature for Applicant

Applicant Signature

Typed or Printed Name

Typed or Printed Name

Address

Age

City State Zip

Address

Phone Number (include Area Code)

City State Zip

Email Address

Phone Number (include Area Code)

Attorney Registration No.

Email Address

PROBATE COURT OF CUYAHOGA COUNTY, OHIO

ANTHONY J. RUSSO, Presiding Judge

LAURA J. GALLAGHER, Judge

TRUST OF _____

CASE NUMBER _____

**FIDUCIARY'S ACCEPTANCE
TRUSTEE
[R.C. 2109.02]**

I hereby accept the duties which are required of me by law, and such additional duties as are ordered by the Court. As trustee of this estate, I will:

1. Make and file an inventory of the real and personal assets of the trust within 3 months after appointment, or such time as extended by the Court;
2. Deposit funds which come into my hands in a lawful depository located within this state; The trust checking accounts must provide canceled checks, as these canceled checks must be displayed when filing accounts;
3. Keep trust funds in separate trust accounts at all times during the administration of the trust;
4. Invest all funds in a lawful manner;
5. Timely pay bond premium, if any;
6. Make and file 1st account within one (1) year following my appointment or such time as ordered by the Court; File additional accounts on at least an annual basis; **Accounts require a personal appearance; Filings by mail are not accepted;**
7. Timely file all tax documents as required by law;
8. Submit all filings with original signatures; In all matters with multiple fiduciaries, the signature of all fiduciaries is required; Persons who are not an attorney may not sign on behalf of an attorney;
9. Obey all orders of the Court; and
10. Immediately notify the Probate Court if I change my address.

I acknowledge that I am subject to removal as trustee if I fail to perform my fiduciary duties.

I acknowledge that I am subject to possible civil and criminal penalties for improper conversion of the property which I hold as fiduciary.

Note ORC §2109.02 states that every fiduciary, before entering into the execution of a trust, shall receive letters of appointment from a Probate Court having jurisdiction of the subject matter of the trust.

The duties of a fiduciary shall be those required by law, and such additional duties as the Court orders. Letters of appointment shall not issue until a fiduciary has executed a written acceptance of those duties, acknowledging the appointment shall not issue until a fiduciary has executed a written acceptance of those duties, acknowledging the possibility of removal for failure to perform those duties, and further being subject to possible penalties for conversion property held as a fiduciary. The written acceptance of duties may be filed with the application for appointment.

Date

Trustee

Email Address

Typed or Printed Name

Phone Number (include Area Code)

Address

City State Zip