

Probate Court of Cuyahoga County, Ohio

Anthony J. Russo, Presiding Judge

Laura J. Gallagher, Judge

CASE NUMBER: _____

IN THE MATTER OF THE

WRONGFUL DEATH TRUST

R.C. 2111.182 TRUST

SPECIAL NEEDS TRUST

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 no. _____;

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 for Applicant

Typed or Printed Name

Address

City, State, Zip

Phone Number (include Area code)

Attorney Registration No.

Applicant

Address

Phone

Name

Address

Phone

Probate Court of Cuyahoga County, Ohio

Anthony J. Russo, Presiding Judge

Laura J. Gallagher, Judge

CASE NUMBER: _____

IN THE MATTER OF THE

"WRONGFUL DEATH TRUST" "*****" R.C. 2111.182 TRUST "*****" SPECIAL NEEDS TRUST

TRUSTEE 'S ACCEPTANCE
[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

Probate Court of Cuyahoga County, Ohio

Anthony J. Russo, Presiding Judge

Laura J. Gallagher, Judge

CASE NUMBER: _____

IN THE MATTER OF THE

WRONGFUL DEATH TRUST

"T(€04333Ø: 4"VTWUV""""""

SPECIAL NEEDS TRUST

TRUSTEE 'S BOND

Amount of bond \$ _____ .

The undersigned principal, and sureties are obligated to the State of Ohio in the above amount, for payment of which we bind ourselves and our successors, heirs, executors, and administrators, jointly and severally.

The principle has accepted in writing the duties of fiduciary in the trust estate including those imposed by law and such additional duties may be required by the Court.

This obligation remains in force if the principle fails to perform such duties, or performs them tardily, negligently, or improperly, or if the principle misuses or misappropriates estate assets or improperly converts them to his own use or the use of another.

[Check if personal sureties are involved.] The Sureties certify that each of them owns real estate in this county, with a reasonable net value as stated below.

Date

Principal

Surety

Surety

by _____
Attorney in Fact

by _____
Attorney in Fact

Type or Printed Name

Type or Printed Name

Address

Address

City, State, Zip Code

City, State, Zip Code

Telephone number (including area code)

Telephone number (including area code)

Net value of real estate
owned in this county

Net value of real estate
owned in this county

\$

\$

Probate Court of Cuyahoga County, Ohio

Anthony J. Russo, Presiding Judge

Laura J. Gallagher, Judge

IN THE MATTER OF THE

WRONGFUL DEATH TRUST

T0E043330: 4"VTWUV

SPECIAL NEEDS TRUST

TRUST INVENTORY

| Description of Personal Estate and Value Thereof | Value | |
|--|-------|--|
| | | |

CASE NUMBER: _____

| Description and Value of Real Estate and the Yearly Rents of Same | Value | |
|--|-------|--|
| | \$ | |
| RECAPITULATION | | |
| Total Value of Personal Estate, | \$ | |
| Total Value of real Estate, | | |
| Yearly Rent of Real Estate, | | |
| Other Income | | |
| Total \$ | | |

The undersigned trustee says that the foregoing is a full inventory of the real and personal estate in the matter with the value of the same and the value of the yearly rent of said estate, according to the best of trustee's knowledge.

Trustee

Probate Court of Cuyahoga County, Ohio

Anthony J. Russo, Presiding Judge

Laura J. Gallagher, Judge

CASE NUMBER: AA

"IN THE MATTER OF THE

""

WTQPI HWNFGCVJ "VTWST""""

"T(E04333B: 4"VTWUV""""

""SPECIAL NEEDS TRUST

TRUSTEE'S ACCOUNT

[R.C.. 2109.30]

| Date 20__ | (Balance from previous account or inventory) | Voucher No. | \$ | \$ |
|--------------|--|-------------|----|----|
| | | | | |

CASE NUMBER: _____

RECAPITULATION

| | | |
|---------------------------|-----------|----------|
| Total Receipts _____ | | \$ _____ |
| Total Disbursements _____ | | \$ _____ |
| Balance _____ | Remaining | \$ _____ |

ITEMIZED STATEMENT OF ALL REMAINING FUNDS, ASSETS AND INVESTMENTS

Item _____
\$ _____

Attorney

Supreme Court Registration No.

Trustee

Address

City , State, Zip Code

(_____)

Telephone Number

ENTRY SETTING HEARING AND ORDERING NOTICE

The Court sets _____ at _____ o'clock ____ m. as the date and time for hearing the above accounting and orders notice to be given as provided by law and Rules of Civil Procedure.

Date

Judge

PROBATE COURT OF CUYAHOGA COUNTY, OHIO

ANTHONY J. RUSSO, Presiding Judge

LAURA J. GALLAGHER, Judge

ESTATE OF _____, DECEASED

CASE NO. _____

**SURVIVING SPOUSE, CHILDREN, NEXT OF KIN,
LEGATEES AND DEVISEES**

(R.C. 2105.06, 2106.13 2107.19, 2113.032)

**[Use with those applications or filings requiring some or all of the
information in this form, for notice or other purposes. Update as required.]**

The following are decedent's known surviving spouse, children, and the lineal descendants of deceased children. If none, the following are decedent's next of kin who are or would be entitled to inherit under the statutes of descent and distribution

| Name | Residence Address | Relationship to Decedent | Birthdate of Minor |
|------|-------------------|--------------------------|--------------------|
| | | Surviving Spouse | |
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[Check whichever of the following is applicable]

- The surviving spouse is the natural or adoptive parent of all of the decedent's children.
- The surviving spouse is the natural or adoptive parent of at least one, but not all of decedent's children.
- The surviving spouse is not the natural or adoptive parent of any of the decedent's children.
- There are minor children of the decedent who are not the children of the surviving spouse.
- There are minor children of the decedent and no surviving spouse.

CASE NO. _____

The following are the vested beneficiaries named in the decedent's Will:

| Name | Residence Address | Birthdate of Minor |
|------|-------------------|--------------------|
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[Check whichever of the following is applicable]

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

Date

Applicant (or give other title)

Signature