

Checklist

Summary Release of Estate

Filing Fee

\$149.00 (Includes 2 certified copies of Judgment Entry)

*Add \$1.00 for any Certificate of Transfer included *if applicable*

Requirements

This proceeding may only be used in one of the following situations:

1. There is a surviving spouse entitled to the entire family allowance; **and** the surviving spouse paid or contracted to pay the funeral bill; **and** the assets do not exceed \$40,000 plus \$5,000 (for reimbursement for funeral).

Note: If the funeral bill was prepaid, a surviving spouse may still do a summary release but the assets cannot exceed \$40,000. If a surviving spouse is electing to take the mansion house as an elective share under R.C. §2106.10 and family allowance under R.C. §2106.13, contact the Court for more information on necessary documentation.

OR

2. The applicant (who is not the surviving spouse) paid or contracted to pay the funeral bill; **and** the assets do not exceed \$5,000; **and** funeral expenses are equal to or exceed the amount of assets.

For more detail on these requirements, see R.C. §2113.031.

For dates of death prior to October 12, 2006, funeral expense reimbursement cannot exceed \$2,000

Note: All paperwork must be typed. We will not accept handwritten documents.

All filings must be single-sided. We will not accept double-sided originals.

Please do not staple original paperwork. We cannot accept filings with staples.

Required filings

- ☐ Application for Summary Release from Administration (Form 5.10)
- ☐ Copy of funeral bill and receipt and/or executed contract for payment of funeral and burial expenses
 - The funeral bill and receipt must evidence who paid the bill.
 - Applicant must be named on the bill as the person who paid the bill.
 - If the body was donated, evidence of the donation must be provided.
 - If multiple parties paid the funeral bill, but do not seek reimbursement, those who do not wish to be reimbursed may file (GC Form 100.1-B Waiver of Right to Reimbursement).
- ☐ Surviving Spouse, Children, Next of Kin, Legatees and Devisees (Form 1.0)
 - If there is Surviving Spouse, make sure a box at the bottom of the form is marked
 - If a next of kin or beneficiary's whereabouts are unknown and cannot be found with due diligence, you may file GC Form 100.2-C – Affidavit of Whereabouts Unknown
- ☐ Contact Information Form (GC Form 75.3-A)
- ☐ Self-Representation Acknowledgment (GC Form 75.1) *If applicable*
 - This form **must** be filed if applicant is not represented by an attorney.
- ☐ Entry Granting Summary Release from Administration (Form 5.11)
- ☐ Supplemental Judgment Entry - Summary Release from Administration (Form 100.1-A)
- ☐ Photocopy of the death certificate – with the social security number marked out
- ☐ Original Last Will and Testament *If applicable*
 - This can be filed for record only.

If automobile is being transferred, proof of the value of the automobile must be provided.

If Real Estate is being transferred:

- ☐ Application for Certificate of Transfer (Form 12.0)
- ☐ Certificate of Transfer (Form 12.1)
 - If property is located in Greene County, this must have the Auditor's approval stamp on the legal description before being filed in Probate Court.
- ☐ Proof of Valuation:
 - You can use (1) a print out of tax value from the County Auditor's Website or (2) a formal Appraisal. If you file the appraisal, you must first file Appointment of Appraiser (Form 3.0).
- ☐ For dates of death prior to January 1, 2013, a form ET 22 is required