

FILINGS

1. SPF 1.0: Surviving Spouse, Children, Next of Kin, Legatees and Devisees
2. SPF 3.0: Appointment of Appraiser and Entry
3. SPF 6.0: Inventory and Appraisal
4. SPF 6.1: Schedule of Assets
5. SPF 6.2: Waiver of Notice of Hearing on Inventory
6. SPF 6.3: Notice of Hearing on Inventory

TIME FRAME

Three months from appointment of fiduciary.
[R.C. 2115.02]

PROBATE ASSETS

1. Real property in Ohio requires the full legal description for real property and is valued on the date of death. [R.C. 2115.02]
2. Tangible and intangible personal property that is to be administered that comes into the possession of the fiduciary. [R.C. 2115.02 and 2115.09]

APPRAISER

1. Suitable disinterested appraiser may be appointed to assist the fiduciary to value property that does not have a readily ascertainable value. [R.C. 2115.02] (SPF 3.0) [Sup. R. 61(B)]
 - a. Exception: County Auditor's value may be used for real property. [R.C. 2115.06]
2. Appraiser may be compensated in an amount that is approved by the fiduciary and the Court. [R.C. 2115.06]; [Sup.R. 61(A)]

NOTICE

1. Taking of Inventory:
 - a. Not less than 5 days prior notice of the taking of the Inventory must be served on the surviving spouse. [R.C. 2115.04]

- b. Proof of service of notice to be filed with Inventory.
- c. Notice may be waived. (SPF 6.0)

HEARING

1. Inventory shall be set for hearing for approval. [R.C. 2115.16]
2. Notice of hearing may be served on any person interested in the estate. (SPF 6.3) The probate court may order notice of hearing on its own or on the motion of an interested party. Notice may be waived. (SPF 6.2)
3. Exceptions:
 - a. To the approval of the Inventory may be filed within five days of the hearing. Exceptions must be served upon the fiduciary and counsel.
 - b. Will be set for hearing and may be set for a pre-trial hearing under Sup.R. 78(E).

ENTRY

The probate court shall enter its order to approve the Inventory. [R.C. 2115.16]



The appraisement of real property on an approved Inventory is conclusive for all purposes. The probate court may order real property reappraised. [R.C. 2115.17]

FIDUCIARY BOND

Court may determine if the fiduciary bond is sufficient upon the filing of an Inventory and may require additional bond. [R.C. 2109.06]

FAILURE TO FILE OR APPEAR [R.C. 2115.03 and 2109.24]

Citation:

1. File or appear
2. If fails to file:
 - a. Removal
 - b. Denial of fiduciary and attorney fees
 - c. Extension to file
 - d. \$100 assessment and \$25.00 court costs
 - e. Contempt of court

NEWLY DISCOVERED ASSETS

A report of assets discovered after the Inventory may be filed. [R.C. 2113.69]