

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION TO PROBATE WILL

[R.C. 2107.11, 2107.18, and 2107.19]

Applicant states that decedent died on _____

Decedent's domicile was _____
Street Address

City or Village, or Township if unincorporated area County

Post Office State Zip Code

A document purporting to be decedent's last will is attached and offered for probate, and applicant waives notice of probate of this will.

Decedent's surviving spouse, children, next of kin, and legatees and devisees, known to applicant, are listed on the attached Form 1.0.

Attorney for Applicant

Applicant

Typed or Printed Name

Typed or Printed Name

Address

Address

Phone Number (include area code)

Phone Number (include area code)

Attorney Registration No. _____

WAIVER OF NOTICE OF PROBATE OF WILL

The undersigned, being persons entitled to notice of the probate of this will, waive such notice. After a certificate is filed evidencing these waivers and any notices given, any action to contest the validity of this will must be filed no more than three months after the filing of the certificate for estates of decedents who die on or after January 1, 2002 and no more than four months after the filing of the certificate for estates of decedents who die before January 1, 2002.

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

ENTRY ADMITTING WILL TO PROBATE

The Court finds that the purported will of decedent, either on the face or from testimony of the witnesses, complies with the applicable law. It is therefore admitted to probate, and ordered recorded. The Court further orders that notice of the probate be given to all parties entitled to notice.

Date

Probate Judge

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

WAIVER OF NOTICE OF PROBATE OF WILL

[R.C. 2107.19(A)(2)]

The undersigned, being persons entitled to notice of the probate of this will, waive such notice. After a certificate is filed evidencing these waivers and any notices given, any action to contest the validity of this will must be filed no more than three months after the filing of the certificate for estates of decedents who die on or after January 1, 2002 and no more than four months after the filing of the certificate for estates of decedents who die before January 1, 2002.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

NOTICE OF PROBATE OF WILL

[R.C. 2107.19(A)]

To: _____

You are hereby notified that the decedent died on the _____ day of _____, _____ that the decedent's will was admitted to probate by this Court located at **Butler County Courthouse, 101 High Street, 2nd Floor, Hamilton, Ohio,** on the _____ day of _____, _____. This notice is given to all persons who would be entitled to inherit from the decedent had the decedent died intestate and to all legatees and devisees named in this will who do not waive notice. You are receiving this notice as:

[check all of the following that apply]

- The Surviving Spouse.
- A person who would be entitled to inherit from the decedent had the decedent died intestate.
- A legatee or devisee named in the will.

After a certificate is filed evidencing any notices given, any action to contest the validity of this will must be filed no more than three months after the filing of the certificate for estates of decedents who die on or after January 1, 2002 and no more than four months after the filing of the certificate for estates of decedents who die before January 1, 2002.

Date

Typed or Printed Name

Address

Phone Number (include area code)

Fiduciary
Applicant for the admission of this will to probate
Applicant for a release from administration
Other interested person
Attorney for any of the above
Attorney Registration No. _____

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

CERTIFICATE OF SERVICE OF NOTICE OF PROBATE OF WILL

[R.C. 2107.19(A)(3)]

The undersigned states that all persons entitled to notice:

[Check all applicable boxes]

- Have waived notice of the admission of this will to probate. The waivers are filed herein.
- Have received notice of the admission of this will to probate.
- Have been notified of the hearing on the probate of this will or a contest as to jurisdiction.
- Evidence of notification is filed herein.
- Have not been notified because their names or places of residence are unknown and cannot with reasonable diligence be ascertained.

-
- Fiduciary
 - Applicant for the admission of this will to probate
 - Applicant for a release from administration
 - Other interested person
 - Attorney for any of the above

Attorney Registration No. _____

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____

CASE NO. _____

SUMMARY OF GENERAL RIGHTS OF SURVIVING SPOUSE

[R.C. 2106.02]

To _____
Surviving Spouse

Address

City, State, Zip Code

This is a summary of your general rights as surviving spouse under Chapter 2106 of the Revised Code. Many of these rights have specific time limits in which they must be exercised. If you have questions concerning your rights, you should discuss them with an attorney of your choice. The Court cannot advise you.

1. Election to Take Under or Against the Will (R.C. 2106.01 - 2106.08)

If you elect to take against the Will, you are entitled to one-half of the decedent's net estate, unless there are two or more of the decedent's children or their lineal descendants surviving, in which case you are entitled to one-third of the decedent's net estate. You will not be entitled to receive any assets given to you under the Will.

If you elect to take under the Will, you will receive those assets given to you under the Will.

Whichever choice you make, (unless you elect to take under the Will and the Will specifically precludes you from exercising these rights), you will not be barred from your rights to purchase certain assets at the appraised value, to remain in the mansion house (the residence) for one year, to receive an allowance for support, to receive not more than two automobiles and one watercraft and one outboard motor owned by the decedent, and to such other rights as a surviving spouse may be entitled under the law.

Although your election may not affect certain non-probate property, such as joint and survivorship, payable on death, and transfer on death property, it may have an effect on other types of non-probate property, including property held in trust.

Before making your election, you are entitled to file a complaint in this Court asking that the Will be construed.

If you elect to take under the Will, you may do so in writing if you wish, but you may also do so by taking no action.

If you elect to take against the Will, you must do so in person before the Probate Judge or a Magistrate. This election must be exercised within five months from the date of the initial appointment of the administrator or executor of the estate or it is forfeited.

2. Right to Receive Mansion House (R.C.2106.10)

Depending upon the value of the real estate, you may have the right to receive the mansion house (the residence) as part of your inheritance.

3. Right to Place Charge on Real Estate (R.C. 2106.11)

If there is no will and there are insufficient assets to pay the specific monetary share due to the surviving spouse pursuant to R.C. 2106.05, you have the right to place a charge (lien) on any real property included in the probate estate in the amount of the unpaid portion of the specific monetary share.

CASE NO. _____

4. Allowance for Support (R.C. 2106.13)

You may be entitled to an allowance for support. For deaths occurring after March 18, 1999, the amount is \$40,000 of probate assets. If there are one or more minor children of the decedent, not the children of the surviving spouse, this Court will apportion the allowance among those children and the surviving spouse.

5. Right to Remain in the Mansion House (R.C. 2106.15)

You have the right to remain in the mansion house (the residence), if it is a probate asset, for a period of one year from the date of death without the payment of rent to the estate. If the mansion house is sold to pay debts during this period of time, you may be entitled to the fair rental value of the mansion house. This election must be exercised within five months from the initial appointment of the administrator or executor or the right is forfeited.

6. Right to Purchase Property (R.C. 2106.16)

You have the right to purchase assets of the probate estate at the appraised values. The application or petition to purchase the assets must be filed within one month of the approval of the inventory or the right is forfeited.

7. Right to Automobiles (R.C. 2106.18)

You may be entitled to receive up to two automobiles, not specifically bequeathed, that would otherwise be included in the probate estate and do not exceed an aggregate value of \$65,000. This right may affect the amount you may receive under the allowance for support. This right must be exercised within five months from the initial appointment of the administrator or executor or the right is forfeited.

8. Right to Watercraft and Outboard Motor (R.C. 2106.19)

You may be entitled to receive one watercraft and one outboard motor, not specifically bequeathed, that would otherwise be included in the probate estate. This right must be exercised within five months from the initial appointment of the administrator or executor or the right is forfeited.

9. Right to Reimbursement of Funeral Bill (R.C. 2106.20)

You may be entitled to be reimbursed for the payment of the funeral bill.

10. Right to Challenge Antenuptial or Separation Agreement (R.C. 2106.22)

You are entitled to file an action to contest the validity of an antenuptial or separation agreement. This action must be filed within four months after the appointment of the executor or administrator or the right is forfeited.

This is a summary of your general rights. There may be additional rights to which you are entitled.

Ohio Revised Code § 2106.25 states:

Unless otherwise specified by a provision of the Revised Code or this section, a surviving spouse shall exercise all rights under Chapter 2106. of the Revised Code within five months of the initial appointment of an executor or administrator of the estate. It is conclusively presumed that a surviving spouse has waived any right not exercised within that five-month period or within any longer period of time allowed by the court pursuant to this section. Upon the filing of a motion to extend the time for exercising a right under Chapter 2106. of the Revised Code and for good cause shown, the court may allow further time for exercising the right that is the subject of the motion.

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

**WAIVER OF SERVICE TO SURVIVING SPOUSE
OF THE CITATION TO ELECT
[R.C. 2106.01(A)]**

The undersigned, surviving spouse of the above named decedent, being eighteen years of age or older and not under disability, waives the service of the citation required by section 2106.01(A) of the Revised Code.

I acknowledge I have received Standard Probate Form 8.3, Summary of General Rights of Surviving Spouse.

I understand that most of my rights must be exercised within five months from the date of the initial appointment of the administrator or executor. If I do not timely elect to exercise any specific right, it will be conclusively presumed I have elected not to exercise that right and the right will be forfeited.

Date

Signature of Surviving Spouse

Typed or printed name of surviving spouse

Attorney for Fiduciary

Typed or Printed Name

Address

City, State, Zip

Telephone Number (include area code)

Attorney Registration No. _____

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION TO RELIEVE ESTATE FROM ADMINISTRATION

[R.C. 2113.03]

Applicant states that decedent died on _____

Decedent's domicile was _____
Street Address

City or Village, or Township if unincorporated area County

Post Office State Zip Code

[Check one of the following]

- Decedent's will has been admitted to probate in this Court.
- To applicant's knowledge, decedent did not leave a will.

[Check one of the following]

- The assets are \$15,000 or less and decedent died on or after January 1, 1976.
- The assets are \$25,000 or less and decedent died on or after October 20, 1987.
- The assets are \$35,000 or less and decedent died on or after November 9, 1994.
- The assets are \$50,000 or less; the surviving spouse is entitled to all of the assets and the decedent died on or after April 16, 1993.
- The assets are \$85,000 or less; the surviving spouse is entitled to all of the assets and the decedent died on or after September 14, 1993.
- The assets are \$100,000 or less; the surviving spouse is entitled to all of the assets and the decedent died on or after March 18, 1999.

Applicant asks that the estate be relieved from administration because the assets do not exceed the statutory limits. A statement of the assets and liabilities of the estate is listed on the attached Form 5.1.

The decedent's surviving spouse, next of kin, legatees, and devisees known to applicant, are listed on the attached Form 1.0.

Attorney for Applicant

Applicant

Typed or Printed Name

Typed or Printed Name

Address

Address

Phone Number (include area code)

Phone Number (include area code)

Attorney Registration No. _____

WAIVER OF NOTICE

The undersigned surviving spouse, heirs at law, legatees, devisees, and other persons entitled to notice of the filing of the application to relieve decedent's estate from administration, waive such notice.

ENTRY SETTING HEARING AND ORDERING NOTICE

The Court sets _____, at _____ o'clock ____ .M., as the date and time for hearing the application to relieve decedent's estate from administration.

[Check one of the following]

- All notice is dispensed with as unnecessary.
- Notice by publication to interested parties is dispensed with as unnecessary. Written notice shall be given, as provided by law and the Rules of Civil Procedure, to those persons entitled to notice, who have not waived notice.
- Written notice is dispensed with as unnecessary. Notice by publication shall be given to interested parties as provided by law and the Rules of Civil Procedure.
- Written notice shall be given to those persons entitled to notice, who have not waived notice, and notice by publication shall be given to interested parties, as provided by law and the Rules of Civil Procedure.

Date

Probate Judge

PROBATE COURT OF BUTLER COUNTY, OHIO

IN THE MATTER OF _____

CASE NO. _____

CONFIDENTIAL DISCLOSURE OF PERSONAL IDENTIFIERS

[Rule 45(D) of the Rules of Superintendence for the Courts of Ohio]

The Rules of Superintendence for the Courts of Ohio require that when submitting a case document to the court for filing, the party shall omit personal identifiers from the document and submit those personal identifiers on separate form.

Complete Personal Identifier	Type of Number	Name/Institution Associated With Personal Identifier	Form Number	Date Filed
example 123-45-6789	Social Security	Deceased	22.3	06/15/09
example: 987654321	Savings Account "A"	Bank of America	15.5	06/15/09

Date: _____

Signature of Filing Party

Typed Name of Filing Party

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

**WAIVER OF NOTICE OF APPLICATION
TO RELIEVE ESTATE FROM ADMINISTRATION**

The undersigned surviving spouse, heirs at law, legatees, devisees, and other persons entitled to notice of the filing of the application to relieve decedent's estate from administration, waive such notice.

_____	_____
_____	_____
_____	_____
_____	_____

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

NOTICE TO ADMINISTRATOR OF ESTATE RECOVERY PROGRAM [R.C. 2117.061]

The undersigned gives notice to the Administrator of the Estate Recovery Program that the decedent was fifty-five (55) years of age or older at the time of death and has been determined to have been a recipient of medical assistance under Chapter 5111 of the Revised Code.

-
- Executor
 - Administrator
 - Commissioner
 - Person who filed pursuant to 2113.03 of the Revised Code for release from Administration.

CERTIFICATE OF SERVICE

This is to certify a true copy of the above notice was served by certified U.S. mail, postage prepaid to the Administrator of the Estate Recovery Program, 150 E. Gay Street, Columbus, Ohio 43215, on the _____ day of _____, _____.

Person Responsible for the Estate

Typed or Printed Name

Address

City, State, Zip

Phone Number (include area code)

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

NOTICE OF APPLICATION TO RELIEVE ESTATE FROM ADMINISTRATION

To the following persons:

Name

Address

Name

Address

Name

Address

Name

Address

Name

Address

An application has been filed in this Court asking that decedent's estate be relieved from administration, saying that the assets in the estate do not exceed the statutory limits.

The hearing on the application will be held _____ at _____ o'clock _____ .M. in this Court.

The Court is located at _____

If you know of any reason why the application should not be granted, you should appear and inform the Court.

Deputy Clerk/Attorney/Applicant

PROBATE COURT OF BUTLER COUNTY, OHIO

IN THE MATTER OF _____

CASE NO. _____

**NOTICE OF INSUFFICIENT ASSETS
TO PAY CREDITORS IN FULL**

[R.C. 2113.03]

[For use in applications to relieve an estate only]

To:

You, as a creditor or other interested party, are hereby notified that on the
day of _____, _____, the applicant,
filed an application to relieve the above estate from administration that indicated there are
insufficient assets in the estate to pay all creditors in full.

Attached to this notice is a copy of BCPC Form 465 – Proposed Distribution in an Application to
Relieve Estate from Administration where Assets are Insufficient to Pay Creditors in Full, which
lists the assets of the probate estate and the amount(s), classification(s) and proposed payment(s)
of debts.

This matter is set for hearing on the _____ day of _____,
at _____, Butler County Probate Court, 101 High Street, Second Floor Hamilton, OH
45011.

You are one of those persons whose interest may be affected by the proposed payment and
if you know of any reason why such payment plan should not be permitted you should appear and
inform the Court.

Applicant/Attorney for Applicant

Attorney Registration No.

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, **DECEASED**

CASE NO. _____

**STATEMENT OF COUNSEL CONCERNING
EXAMINATION OF RECORD TITLE**

The undersigned states that he/she has examined the real estate records of the County in which the hereinafter real estate is located, as set out in the Inventory and Appraisal filed herewith and described specifically below, and that to the beset of the undersigned's knowledge, from said records, the above decedent had at the time of decedent's death the interest in the real estate which is set forth in the Inventory and Appraisal.

Name

Firm Name

Address

Attorney of Record Signature

City, State, Zip

Attorney Name and Registration Number

Phone (include area code)

Attorney Registration Number

The legal description of decedent's interest in the real property subject to this statement is:

Note: If the decedent's interest in the real property is a fractional interest this should be stated.

Prior Instrument Reference: _____

Parcel No.: _____

Address of Property: _____

100% Taxable Value of Real Estate per Auditor's Records: _____

Description: _____

Open Mortgages of Record: (list all open mortgages with book/page with face amount and recording information)

Open Liens of Record: (list all open liens which attached to the subject real estate) _____

Comments: _____

(Use continuation page, if necessary)

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

ENTRY RELIEVING ESTATE FROM ADMINISTRATION

[R.C. 2113.03]

Upon hearing the application to relieve decedent's estate from administration, the Court finds that:

Decedent died [check one of the following] - testate - intestate. The date of death and domicile are as stated in the application, and the Court has jurisdiction over the estate;

Notice to the surviving spouse, heirs at law, legatees, devisees, and other persons was duly effected or dispensed with by the Court as unnecessary;

The values of the several assets in the estate, given in the application do not exceed the statutory limits.

The Court therefore relieves the estate from administration, and orders [check and complete whichever of the following are applicable]:

That the following personal property be sold [describe]:

That the following debts of decedent shall be paid to the extent of assets:

That the statutory family allowance be paid to the surviving spouse - minor children of the decedent - apportioned between the surviving spouse and minor children of the decedent who are not the children of the surviving spouse. Attach Form 7.2 if necessary.

That Certificate of Transfer No. _____, attached to the application and describing decedent's real estate, issue and be preserved in the records of the Court and that authenticated copies of the certificate be delivered as required to the persons entitled to them;

That the financial institutions holding accounts in decedent's name as set forth below pay the same upon proper tax release [check one of the following] - to the commissioner - to

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION AND ENTRY TRANSFER MOTOR VEHICLE

[R.C. 2106.18]

The undersigned, qualified fiduciary of the above estate, represents he has in his possession the following described motor vehicle, belonging to said estate:

Year _____ Body Type _____ Model _____ Make _____

Mfrs. Serial No. _____ Cert. of Title No. _____

Applicant states that the following person is entitled to such motor vehicle - by virtue of the will - by the statute of descent and distribution - by family allowance - by purchase - by law - by other _____

Applicant requests that the above mentioned motor vehicle be transferred to:

Name _____

Address _____

Applicant

ENTRY TRANSFER OF MOTOR VEHICLE

The court finds that all of the statements in the above application are true and that the above transferee is entitled to such motor vehicle.

It is therefore ordered that said fiduciary transfer said motor vehicle as prayed for.

Probate Judge

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

APPLICATION FOR CERTIFICATE OF TRANSFER

[R.C. 2113.61]

Applicant states that decedent died on _____

Decedent's residence at death was _____
Street Address

City or Village, or Township if unincorporated area County

Post Office State Zip Code

Decedent died owning the real property described in the accompanying Certificate of Transfer No _____, which also lists those persons to whom the real property passed. Applicant asks the Court to issue a Certificate of Transfer so that new ownership interests may be recorded.

[Check the applicable boxes]

- Decedent died intestate.
- Decedent died testate on _____; will admitted to probate on _____.
- Decedent's known debts have been paid or secured to be paid.
- Sufficient other assets are in hand to pay decedent's known debts.
- Estate is insolvent and the transfer shall apply toward the allowance for support.
- Applicant was appointed by this Court on _____ and is the qualified and acting executor or administrator of decedent's estate.
- Executor or administrator of decedent's estate failed to file this application before being discharged.
- Applicant is the executor or administrator appointed in another state. There is and has been no ancillary administration in Ohio. The real property to be transferred is located in this county.
- The transfer is subject to a written contract for the sale and conveyance of the real property, entered into but uncompleted by decedent before death. A copy of the contract is attached.
- There has been no administration and none is contemplated [R.C. 2113.61(D)].
- The transfer is pursuant to decedent's Will.
- The transfer is pursuant to the statutes of descent and distribution.
- The transfer is pursuant to summary release from administration [R.C. 2113.031(D)(3)]
- The real property to be transferred is subject to a charge in favor of the surviving spouse in the amount of \$ _____ as computed pursuant to R.C. 2106.11 on attached Exhibit A, and as shown on the accompanying Certificate of Transfer, in respect of the unpaid balance of the specific monetary share which is part of the surviving spouse's total intestate share.

CASE NO. _____

- Spousal elections have been exercised.
- Disclaimers or assignments have been filed.
- The transfer is of decedent's entire interest in the mansion house to the surviving spouse, who hereby elects to take such interest as part or all of the intestate share and/or allowance for support. **[If this paragraph is checked, the following must be completed, and both the surviving spouse and applicant must sign this form].**

The value of the total intestate share to which decedent's surviving spouse is entitled is..... \$ _____

The value of the allowance for support to which decedent's surviving spouse is entitled is..... \$ _____

The value of decedent's entire interest in the mansion house is:

Interest in mansion house.....\$ _____

Interest in household goods in house.....\$ _____

Interest in lots or farm land adjacent to house and used in conjunction with it, which are described in Certificate of Transfer and which spouse hereby elects to include.....\$ _____

Less: Decedent's share of liens on any and all of above.....\$ _____

Total.....\$ _____ \$ _____

Surviving Spouse

Applicant

Title or status

ENTRY ISSUING CERTIFICATE OF TRANSFER

The Court finding that the above application contains the information required by statute orders that Certificate of Transfer No. _____ be filed with this Entry and a copy of the Certificate of Transfer be issued for recording.

[Check if applicable] The Court further finds that the transfer is subject to a charge pursuant to R.C. 2106.11.

Date

Probate Judge

CASE NO. _____

The legal description of decedent's interest in the real property subject to this certificate is: **[use extra sheets, if necessary]**.

Prior Instrument Reference:

Parcel No:

This instrument prepared by _____

ISSUANCE

This Certificate of Transfer is issued this _____ day of _____, 20_____.

Probate Judge

AUTHENTICATION

I certify that this document is a true copy of the original Certificate of Transfer No. _____ issued on _____ and kept by me as custodian of the official records of this court.

Date

Probate Judge

By _____
Deputy Clerk



Ohio Department of TAXATION

Estate Tax Division
1 (800) 977-7711
www.ohio.gov/tax

Date Estate Tax Return and/or
this Form Filed in Probate Court

Certificate of Estate Tax Payment and Real Property Disclosure for Dates of Death on or after November 8, 1990

This form should not be sent to the Estate Tax Division in Columbus.

Estate of: Decedent's last name		Decedent's first name and initial
County of residence	Case number	Date of death

Part I – Please complete either Section A or B, whichever is applicable.

A. This section is to be completed by the estate representative where an Ohio Estate Tax Return is required to be filed.

Date of death (please check one):

- On or after January 1, 2002 – over \$338,333
- On or after January 1, 2001 through December 31, 2001 – over \$200,000
- On or after June 30, 1983 through December 31, 2000 – over \$25,000.

- The estate tax return due for this estate was filed in probate court on the date stamped hereon.
- All estate taxes shown due, if any, on the return have been paid in full. (This step will take effect upon verification by the County Auditor on page 3, Part II of this form.)
- All real property listed in the inventory for the decedent's estate is included in the estate tax return as well as the following real property not listed in the inventory and attached to this certificate.
- The real property attached to this certificate shall be free of any lien for estate taxes under O.R.C. Sections 5731.02 and 5731.19(A). This certificate does not take effect until verification of payment of tax is received from the County Auditor's office. This certificate does not reflect the Tax Commissioner's final determination of estate tax under O.R.C. Section 5731.26.

B. This section is to be completed by the estate representative where no Ohio Estate Tax Return is required to be filed.

Date of death (please check one):

- On or after January 1, 2002 – under \$338,333
- On or after January 1, 2001 through December 31, 2001 – under \$200,000
- On or after June 30, 1983 through December 31, 2000 – under \$25,000.

- No estate tax return is required to be filed because the gross estate, which includes all real property, falls below the filing requirements set forth in O.R.C. Section 5731.21(A)(3).
- All real property listed in the attached inventory for the decedent's estate, as well as the following real property not listed in the inventory and attached to this certificate, shall be free of any lien for estate taxes under O.R.C. Sections 5731.02 and 5731.19(A).

Declaration

The information contained on this certificate, to the best of my knowledge, is true and complete.

Name of estate representative

Address of estate representative

Signature of estate representative

Date

Instructions for Completion

Estate Representative

If an estate tax return is required to be filed.

- ▶ The estate representative completes **Section A** in **Parts I and II** of this certificate. The estate representative is required to sign **Part I** of the certificate. For dates of death on or after November 8, 1990, this certificate is required to accompany one of the following returns when it is filed with the probate court:
 - (a) Resident Ohio Estate Tax Return (Estate Tax Form 2)
 - (b) Nontaxable Return (Estate Tax Form 2)
 - (c) Ohio Nonresident Estate Tax Return (Estate Tax Form 4)
 - (d) Amended Resident Ohio Estate Tax Return (Estate Tax Form 2-X)

If no estate tax return is required to be filed.

- ▶ The estate representative completes **Section B** in **Part I** only. The estate representative is required to sign **Part I** of this certificate.

Probate Court

If an estate tax return is required to be filed.

- ▶ Upon receipt of one of the above-listed returns for filing, the probate court date stamps both the return and **Part I** of this certificate.

Part I is maintained in the court's public record file. **Part II** of this certificate is forwarded to the county auditor with the filed return or Estate Tax Form 5 for verification of payment of tax.

After receipt of **Part II** of this certificate from the county auditor, the probate court signs and date stamps **Section C**. **Part II** is then filed with **Part I** in the public record file.

If no estate tax return is required to be filed.

- ▶ The probate court date stamps **Part I** of this certificate. **Part I** is then maintained in the probate court's public record file. **Part II** is not applicable.

County Auditor

If an estate tax return is required to be filed.

- ▶ If the estate taxes have been paid in full, the county auditor completes **Section B of Part II** of this certificate to verify that the taxes have been paid in full. The county auditor validates the date the return was filed. **Part II of this certificate is maintained at the county auditor's office until all taxes shown to be due have been paid.** When the taxes are paid, the county auditor signs and date stamps **Part II**. After completion, **Part II** is returned to the probate court. This same procedure is followed for nontaxable filings.

If no estate tax return is required to be filed.

- ▶ Neither **Part I** nor **Part II** of this certificate shall be forwarded to the county auditor's office.

Property Description

If an estate tax return is required to be filed.

- ▶ Attach all real property not listed in the inventory including permanent parcel number, address and full legal description.

If no estate tax return is required to be filed.

- ▶ Attach a copy of the inventory for the decedent's estate as well as all real property not listed on the inventory, including permanent parcel number, address and full legal description.

**Certificate of Estate Tax Payment and Real Property Disclosure
for Dates of Death on or After November 8, 1990
(O.R.C. Section 5731.21)**

Part II

A. This section is to be completed by the Estate Representative.

Estate of _____ Case number _____

Date of death _____ County _____

B. This section is to be completed by the County Auditor.

I hereby verify that the estate taxes shown due on the estate tax return filed on _____
have been paid in full.

County Auditor

By: _____
Deputy

**Date Tax Paid to
County Auditor**

C. This section is to be completed by the Probate Judge.

The verification of this certificate by the County Auditor was filed in this court on the date
stamped hereon.

Probate Judge

By: _____
Deputy

**Date Filed in
Probate Court**

Instructions for Completion

Estate Representative

If an estate tax return is required to be filed.

- ▶ The estate representative completes **Section A** in **Parts I and II** of this certificate. The estate representative is required to sign **Part I** of the certificate. For dates of death on or after November 8, 1990, this certificate is required to accompany one of the following returns when it is filed with the probate court:
 - (a) Resident Ohio Estate Tax Return (Estate Tax Form 2)
 - (b) Nontaxable Return (Estate Tax Form 2)
 - (c) Ohio Nonresident Estate Tax Return (Estate Tax Form 4)
 - (d) Amended Resident Ohio Estate Tax Return (Estate Tax Form 2-X)

If no estate tax return is required to be filed.

- ▶ The estate representative completes **Section B** in **Part I** only. The estate representative is required to sign **Part I** of this certificate.

Probate Court

If an estate tax return is required to be filed.

- ▶ Upon receipt of one of the above-listed returns for filing, the probate court date stamps both the return and **Part I** of this certificate.

Part I is maintained in the court's public record file. **Part II** of this certificate is forwarded to the county auditor with the filed return or Estate Tax Form 5 for verification of payment of tax.

After receipt of **Part II** of this certificate from the county auditor, the probate court signs and date stamps **Section C**. **Part II** is then filed with **Part I** in the public record file.

If no estate tax return is required to be filed.

- ▶ The probate court date stamps **Part I** of this certificate. **Part I** is then maintained in the probate court's public record file. **Part II** is not applicable.

County Auditor

If an estate tax return is required to be filed.

- ▶ If the estate taxes have been paid in full, the county auditor completes **Section B** of **Part II** of this certificate to verify that the taxes have been paid in full. The county auditor validates the date the return was filed. **Part II of this certificate is maintained at the county auditor's office until all taxes shown to be due have been paid.** When the taxes are paid, the county auditor signs and date stamps **Part II**. After completion, **Part II** is returned to the probate court. This same procedure is followed for nontaxable filings.

If no estate tax return is required to be filed.

- ▶ Neither **Part I** nor **Part II** of this certificate shall be forwarded to the county auditor's office.

Property Description

If an estate tax return is required to be filed.

- ▶ Attach all real property not listed in the inventory including permanent parcel number, address and full legal description.

If no estate tax return is required to be filed.

- ▶ Attach a copy of the inventory for the decedent's estate as well as all real property not listed on the inventory, including permanent parcel number, address and full legal description.

PROBATE COURT OF BUTLER COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

REPORT OF DISTRIBUTION

Now comes your duly appointed _____ herein and submits his/her Report in said matter.

Distribution of the assets has been made in accordance with the previous order of this Court in the following manner.

DATE	TO WHOM SOLD OR DISTRIBUTED	DESCRIPTION	VALUE

Commissioner

JUDGMENT ENTRY

DATE _____

The within report and distribution having been made according to law and the former order of the Court, it ordered that the report and distribution are hereby approved.

APPROVED:

Attorney

Judge