

**Thomas A. Swift, Judge
TRUMBULL COUNTY PROBATE COURT
161 High Street
Warren, Ohio 44481
(330) 675-2521
fax: 675-2524**

TRUST PACKET

The following forms are included in the trust packet:

- ✓ Application for Appointment of Trustee
- ✓ Waiver and Consent
- ✓ Trust Beneficiaries and Contingent Beneficiaries
- ✓ Trustee's Acceptance
- ✓ Trustee's Bond

In addition to the above forms, please submit a copy of decedent's will (Testamentary Trust) or journal entry establishing trust (Wrongful Death, Inter Vivos, Special Needs or Minor Settlement Trusts).

The filing fee is \$125.00

**IN THE PROBATE COURT OF TRUMBULL COUNTY, OHIO
THOMAS A. SWIFT, JUDGE**

IN THE MATTER OF THE
 WRONGFUL DEATH TRUST
 INTER VIVOS TRUST
 TESTAMENTARY TRUST
 SPECIAL NEEDS TRUST
 MINOR SETTLEMENT TRUST
 of _____
 (Deceased) (Grantor)

Case No. _____

APPLICATION FOR APPOINTMENT OF TRUSTEE

The undersigned 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. _____
- Inter Vivos Trust created by _____ on _____;
- Testamentary Trust created by Item _____ of the Last Will and Testament of _____, Deceased, Estate case no. _____
Attached is a copy of the Last Will and Testament;
- Special Needs Trust created by _____ on _____;
- Minor Settlement Trust created by _____ on _____;

and state(s) that the estimated property of said trust estate is as follows:

Personal Property	\$ _____
Real Estate	\$ _____
Annual Rentals	\$ _____
TOTAL	\$ _____

and state(s) that:

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

Attorney

Address

City State Zip Code

Phone

Registration No.

Applicant

Address

City State Zip Code

Phone

Applicant

Address

City State Zip Code

Phone

**IN THE PROBATE COURT OF TRUMBULL COUNTY, OHIO
THOMAS A. SWIFT, JUDGE**

IN THE MATTER OF THE
 WRONGFUL DEATH TRUST
 INTER VIVOS TRUST
 TESTAMENTARY TRUST
 SPECIAL NEEDS TRUST
 MINOR SETTLEMENT TRUST
of _____

Case No. _____

TRUSTEE'S ACCEPTANCE

I, the undersigned, hereby accept the duties which are required of me by law and such additional duties as are ordered by the Court having jurisdiction of the subject matter of the trust, as trustee.

1. Making and filing an inventory of the real and personal property contained in the trust estate within 3 months after appointment;
2. Administering the trust estate in accordance with law and the Will of testator;
3. Depositing funds which come into my hands in a lawful depository located within this state;
4. Investing surplus funds in a lawful manner;
5. Making and filing an account at least once in each two years;
6. Filing a final account within 30 days after the trusteeship is terminated.

I acknowledge that I am subject to removal as such fiduciary if I fail to perform such duties. I also acknowledge that I am subject to possible penalties for improper conversion of property which I hold as such fiduciary.

Signature

Name

Date

**PROBATE COURT OF TRUMBULL COUNTY, OHIO
THOMAS A. SWIFT, JUDGE**

IN THE MATTER OF THE TRUST OF _____
Case No. _____

TRUSTEE'S BOND

Amount of Bond \$ _____

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

The principal has accepted in writing the duties of fiduciary in the above matter, including those imposed by law and such additional duties as may be required by the Court.

This obligation is void if the principal performs such duties as required.

This obligation remains in force if the principal fails to perform such duties, or performs them tardily, negligently, or improperly, or if the principal misuses or misappropriates the assets or improperly converts them to the fiduciary's use or the use of another.

Date

Principal

Surety

Surety

by _____
Attorney in Fact

by _____
Attorney in Fact

Typed or Printed Name

Typed or Printed Name

Address

Address

Net value of real estate owned in this county:

Net value of real estate owned in this county:

\$ _____

\$ _____

**PROBATE COURT OF TRUMBULL COUNTY, OHIO
THOMAS A. SWIFT, JUDGE**

IN THE MATTER OF THE

- WRONGFUL DEATH TRUST
- INTER VIVOS TRUST
- TESTAMENTARY TRUST
- SPECIAL NEEDS TRUST
- MINOR SETTLEMENT TRUST

Case No. _____

of _____

WAIVER AND CONSENT

We, the undersigned, do each of us hereby waive the issuing and service of notice, and voluntarily enter our appearance herein.

And we do hereby consent to the appointment of _____

as trustee of _____
