

**PROBATE COURT OF TRUMBULL COUNTY, OHIO
JAMES A. FREDERICKA, JUDGE**

TRUST PACKET

- The follow 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

****The Probate Court accepts payment by cash, check, and money order only.
The Court does not accept payment by debit or credit cards.****

PROBATE COURT OF TRUMBULL COUNTY, OHIO
JAMES A. FREDERICKA, 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 in 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

PROBATE COURT OF TRUMBULL COUNTY, OHIO
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IN THE MATTER OF THE:

WRONGFUL DEATH TRUST
INTER VIVOS TRUST
TESTAMENTARY TRUST
SPECIAL NEEDS TRUST
MINOR SETTLEMENT TRUST
of _____

(Deceased) (Grantor)

CASE NO. _____

TRUST BENEFICIARIES and CONTINGENT BENEFICIARIES

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

The following are the named beneficiaries and contingent beneficiaries or the foregoing Trust:

[illegible]

Date _____

Applicant (or give other title)

PROBATE COURT OF TRUMBULL COUNTY, OHIO
JAMES A. FREDERICKA, JUDGE

IN THE MATTER OF THE:

**WRONGFUL DEATH TRUST
INTER VIVOS TRUST
TESTAMENTARY TRUST
SPECIAL NEEDS TRUST
MINOR SETTLEMENT TRUST**
of _____

CASE NO. _____

(Deceased) (Grantor)

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
JAMES A. FREDERICKA, 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
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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 _____ .

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____