

TRUMBULL COUNTY PROBATE COURT

Judge James A. Fredericka
www.trumbullprobate.org

CHECKLIST OF ESTATE PROCEDURE For date of death on or after Jan 1, 2002

Estate of _____
 Address of Decedent _____
 Date of Death _____ Social Security No _____
 Probate Court Case No _____ Date Filed _____
 Fiduciary _____
 Address _____
 Phone No (Home) _____ (Work) _____
 Fed Tax ID No _____ Estate Income Tax Year _____ to _____

	Due Time	Due Date	Date Filed	Item	Rule*
Name and Addresses of the Surviving Spouse					
Heirs					
Devises and Legatees				Std Form 10	58
Court Costs Deposit					
File Will with Application for Admission				Std Forms 10, 20	59
Waivers or Notice to Parties Entitled				Std Forms 21, 22, 86	
Will Admitted to Probate				Std Form 23	
Application for Authority to Administer				Std Forms 10, 40	60
Waivers or Notice to Parties Entitled (includes Declinations)				Std Forms 44 & 43	
Bond of Fiduciary				Std Form 42	
Appointment of Fiduciary		Day 1		Std Form 45	
Apply for Funeral Benefits					
Social Security					
Veterans Administration					
Public Employees Retirement System					
Railroad Retirement					
Apply for Monthly Benefits (See above Agencies or Private Employers)					
Appointment Appraiser				Std Form 30	61
Notice to Administrator of Estate Recovery Program				Std Form 70	
Notify Post Office of Address Change				USPS Form 3575	
Affidavit of Spouse to Receive Automobile				RC 2106 18	

Pay Appraisers Fee \$ _____
 Apply for Fed Tax ID Number _____
 Selection of Estate Income Tax Year _____
 File Certificate of Service of Notice of Probate of Will _____
 File Inventory _____
 Schedule of Assets or Extension _____
 File Family Allowance _____
 Obtain Tax Releases _____
 Change Bank Accounts & Securities to Estate Name _____
 File Decedent's final Fed Personal Income Tax Return and Fid Release from Liability _____
 File Decedent's final Ohio Personal Income Tax Return _____
 Schedule of Claims (if Insolvent) _____
 Claim of Executor _____
 Election of Surv Spouse against Will Due within 5 months of appointment _____
 Passage of Will Contest Period _____
 Account with Receipts _____
 File Certificate of Service of Account to Heirs of Beneficiaries _____
 Application to Extend Administration _____
 Ohio Estate Tax Return (Date of Death) _____
 Fed Estate Tax Return (Date of Death) and Fid Release from Liability _____
 Closing Letter on Fed Estate Tax & Ohio Estate Name _____
 Fed Estate Income Tax Return _____
 Ohio Estate Income Tax Return _____
 IRS Carry over loss to Beneficiaries _____
 Distribution in Kind and Certificate of Transfer for Real Estate _____
 Income Tax Basis of Distributed Property mailed to Distributee _____
 Application for Counsel Fees _____

Due Time	Due Date	Date Filed	Item	Rule*
				61
			IRS form SS4	
			Std Form 24	
2 Mos			Std Forms 10, 60	
90 Days			Std Form 61	
90 Days			R C 2106 13	
5 Mos			Std Form 71 or 72	
			OET Form 14	
			IRS Form 1040	
			Form IT-1040	
3 Mos			R C 2117 02	
			Std Form 82	
3 Mos			R C 2107 76	
6 Mos			Std Forms 13.0 & 13.1	64
6 Mos			Std Form 13 9	
6 Mos			Std Form 13 8	
9 Mos			OET Forms 2 or 4	
9 Mos			IRS Form 706	
			IRS Form 1041	
			Form IT 1041-E	
			IRS Form 1041 K-1	
			Std Forms 10 0, 12 0, 12 1	
				71

*See Ohio Supreme Court's Rules of Superintendence for Common Pleas Courts and Trumbull County Probate Court's County Local Rules