

What is Probate ?

In each County of Ohio, Probate Court has jurisdiction (authority) to settle estates.

After the *original* Last Will of a deceased person is filed in the appropriate Probate Court, that Court will appoint an Executor to notify all next of kin and all who were named in the Will, to Inventory all Estate assets – (including real estate, financial assets / accounts, & motor vehicles) to deposit funds of the deceased into an Estate account, to pay bills of the estate and then, to prepare the necessary documents to transfer ownership of real estate (such as home &/or land), and to distribute the remaining funds, in accord with Ohio law and the Last Will.

If you seek the assistance of Attorney Diane K. DePascale to Probate a case, please provide this information *by email* to [Diane@DePascale Law.com](mailto:Diane@DePascaleLaw.com)

1. _____ (full name & relationship), born _____ (date)
died on _____ (date) in _____ County, State of _____.
2. At the time of death,
s/he resided at _____ (full address, including city & state)
which is in _____ County,
a) a home that s/he /we owned,
b) a _____ s/he rented, &
c) now, occupied by _____ (full name & relationship to the deceased).
3. Did the deceased person have a **Last Will**, that s/he signed ? — *circle a, b, -or- c)*
a) Yes, I have (or Atty. _____ has) the original, & I am named Executor.
b) No, s/he told me that s/he *never had a Will*.
c) I don't know so, I'll ask close family members and his/her former attorneys,
—(including all attys. who advised &/or represented him/her in *any* case).
4. Is the deceased person survived by **Family** ?
— Please answer: *yes or no* & if yes, write full names, addresses, & phone numbers.
a) surviving spouse ? _____
b) minor children ? _____
c) adult children ? _____
d) IF no spouse nor children, surviving parent(s) _____
& siblings _____

5. IF any other people or organization is named as a beneficiary in the Will, please provide full names, home addresses, email & phone numbers.
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6. Is there **Property** in the name of the deceased person ? _____

a) Real Estate ? (home, building, condo, land, . . .) *Yes or No* _____

— Full addresses _____
including _____ County and State of _____.

b) Financial accounts ?

— List all funds on deposit in any account in any bank, savings & loan, credit union, regulated investment co., mutual fund or other financial institution.

Accounts include checking, certificate of deposit ("CD"), investment, savings, individual retirement account ("IRA"), stock option, etc.

c) Safe deposit box(es) ? _____

d) Motor vehicles ? – year, make, model & location _____

e) Anything else that is not inside his/her home ? _____

7. Please bring these documents to your 1st office conference with Atty. DePascale:

a) certified copy of the Death certificate,

b) Funeral bill – marked “*paid-in-full*” or -0- balance due,

c) Full names & addresses of every heir named in the Last Will,

d) Last / most recent statements regarding

(i.) Home mortgage(s), utilities, & other household expenses;

(ii.) Financial accounts — # 5. b);

(iii.) Motor vehicle title &/or loans, and Kelly Blue Book estimated value;

(iv.) All other assets and debts; and

(v.) Statements from Medicaid, retirement / nursing home, and Dr. / Hospital.

8. IF you were named by the deceased person, in the Last Will to be **Executor**, are you able & willing to identify all surviving family, property & debts, & comply with OH Probate law including opening an Estate account, & providing all Estate Acc’t. bank statements, with documents identifying the source of each deposit & the bill for each expense paid, so an Inventory shall be filed in Probate Ct. within 3 months after you are appointed Executor ?

Circle: yes / no.