

**IN THE WARREN COUNTY, OHIO COMMON PLEAS COURT  
PROBATE DIVISION**

IN THE MATTER

- WRONGFUL DEATH TRUST
- TESTAMENTARY TRUST
- SPECIAL NEEDS TRUST
- OTHER

OF: \_\_\_\_\_, Deceased, Grantor

for the Benefit of: \_\_\_\_\_

CASE NO. \_\_\_\_\_

**APPLICATION FOR APPOINTMENT OF TRUSTEE**

\_\_\_\_\_ and \_\_\_\_\_  
a resident(s) of \_\_\_\_\_, hereby makes application to be appointed  
Trustee(s) of the:

- Wrongful Death Trust fbo \_\_\_\_\_ as the result of  
the death of \_\_\_\_\_ Estate Case No. \_\_\_\_\_
- Testamentary Trust created by Item \_\_\_\_\_ of the Last Will and Testament of  
\_\_\_\_\_, deceased. Estate Case No. \_\_\_\_\_
- Special Needs Trust created by \_\_\_\_\_ on \_\_\_\_\_
- Other \_\_\_\_\_

**A copy of the Will or Trust Agreement is attached**

Applicant states that the estimated property of said trust estate, is as follows:

Personal Property	\$ _____
Real Property	\$ _____
Annual Rentals	\$ _____
Other Annual Income	\$ _____
Total	\$ _____

and further states that

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

\_\_\_\_\_  
Attorney for Applicant

\_\_\_\_\_  
Applicant

\_\_\_\_\_  
Typed Name of Attorney for Applicant

\_\_\_\_\_  
Typed Name of First Applicant

\_\_\_\_\_  
Address

\_\_\_\_\_  
Typed Name of Second Applicant

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone No. (including Area Code)

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Attorney Registration No.

\_\_\_\_\_  
Phone No. [Include Area Code]



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**ENTRY APPOINTING TRUSTEE; LETTERS OF AUTHORITY**

Name of Trustee: \_\_\_\_\_

Name(s) of Co-Trustee(s) [If any]: \_\_\_\_\_

On hearing in open court on the application for appointment of trustee, the Court finds that the Applicant is a suitable and competent person to execute the trust, that applicant has filed a written acceptance of duties as Trustee and that the Trustee's Bond has been

**[Check one of the following]:**

- Filed and approved
- Waived under the terms of the Decedent's Will
- Waived according to law

The Court therefore appoints applicant as Trustee. This entry of appointment constitutes the trustee's letters of authority.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Judge

**CERTIFICATE OF APPOINTMENT AND INCUMBENCY**

The above document is a true copy of the original kept by me as custodian of the records of this Court. It constitutes the appointment and letters of authority of the named fiduciary, who is qualified and acting in such capacity.

(Seal)

\_\_\_\_\_  
JUDGE

\_\_\_\_\_  
Deputy Clerk

\_\_\_\_\_  
Date

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**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 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:

\$ \_\_\_\_\_

\$ \_\_\_\_\_

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**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

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**TRUSTEE'S INVENTORY**  
[R.C. 2109.58]

Description of Real and Personal Property	Value
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\$

[use additional pages, if necessary]

**RECAPITULATION**

Total Value of Personal Estate _____	\$	_____
Total Value of Real Estate _____	\$	_____
Yearly Rent of Real Estate _____	\$	_____
Other Annual Income _____	\$	_____
Total _____	\$	_____

\_\_\_\_\_  
Trustee