

**PIKE COUNTY PROBATE COURT
230 WAVERLY PLAZA, SUITE 600
WAVERLY, OHIO 45690
(740) 947-2560
(740) 941-3086 (FAX)**

INFORMATION AND INSTRUCTIONS FOR FILING THE GUARDIAN'S ACCOUNT:

By law, the Probate Court is the superior guardian. At the time of their appointment, all guardians sign an oath with regards to their duties and must obey all court orders with regards to the guardianship. The Court uses several means to assist in this supervisory role.

A guardian of an estate is required to file a Guardian's Account every two (2) years with the Court. This account will show all receipts and expenditures and the remaining assets of the ward. In some cases, an annual account may be required.

The Pike County Probate Court has established a practice of reminding guardians when their account is due. However, this is only offered as a courtesy for case efficiency and should not be relied upon by the guardian. The guardian is required to submit their account on a timely basis when due. Guardians are further encouraged to seek the advice of legal counsel with respect to the preparation of their account as neither the Judge or the deputy clerks are permitted to offer assistance or advice with the preparation of the account.

You will need the following forms to file your account. **You are also required to submit all bank statements for the accounting period.** These bank statements will be reviewed by the Court and returned back to you after the account is reviewed and approved by the Judge. It is suggested that you call the Court prior to filing your account to see if there will be any court costs due.

Form 15.8 – Guardian's Account

Form 15.81 – Bank Certificate

Form 13.5 – Notice of Hearing on Account

Form 13.7 – Waiver of Notice of Hearing on Account

Form 13.3 – Entry Approving and Settling Account

RECAPITULATION

Total Receipts _____ \$ _____
Total Disbursements _____ \$ _____
Balance Remaining _____ \$ _____

ITEMIZED STATEMENT OF ALL FUNDS, ASSETS AND INVESTMENTS

ITEM _____

\$

Attorney

Guardian

Attorney Registration No. _____

Typed or Printed Name

Address of Guardian

ENTRY SETTING HEARING

The Court sets _____ at _____
o'clock _____.M., as the date and time for hearing the above account.

Date

Probate Judge

PROBATE COURT OF PIKE COUNTY, OHIO

IN THE MATTER OF GUARDIANSHIP OF _____

Case No. _____

BANK CERTIFICATE

N.B. must be executed when funds are on deposit.

I HEREBY CERTIFY that the within named fiduciary, on the date named below, had on deposit in

The _____ of _____, Ohio,

the sum of \$ _____ on _____ to the credit of
Nature of Deposit

the estate of _____

Bank

Dated _____

By _____
Cashier

Fiduciary

BANK CERTIFICATE

N.B. must be executed when funds are on deposit.

I HEREBY CERTIFY that the within named fiduciary, on the date named below, had on deposit in

The _____ of _____, Ohio,

the sum of \$ _____ on _____ to the credit of
Nature of Deposit

the estate of _____

Bank

Dated _____

By _____
Cashier

Fiduciary

PROBATE COURT OF _____ COUNTY, OHIO

ESTATE OF _____, DECEASED

CASE NO. _____

NOTICE OF HEARING ON ACCOUNT

[R.C. 2109.33]

To:

You are hereby notified that a _____ account covering the period from _____ to _____ has been filed, and the hearing will be held on _____ at _____ o'clock ____ M. The Court is located at _____

You are required to examine the account, to inquire into the contents of the account, and into all matters that may come before the Court at the hearing on the account. Any exceptions to the account shall be filed in writing not less than five days prior to the hearing. Absent the filing of written exceptions, the account may be approved without further notice.

Fiduciary/Attorney for Fiduciary

Attorney Registration No. _____

PROBATE COURT OF _____ COUNTY, OHIO

TRUST OF
GUARDIANSHIP OF
ESTATE OF _____

CASE NO. _____

ENTRY APPROVING AND SETTLING ACCOUNT
[R.C. 2109.32]

Upon hearing the account filed _____, the Court finds that:

[Check whichever of the following are applicable]

- The _____ partial account has been lawfully administered;
- The estate has been lawfully administered, except for final distribution to the beneficiaries;
- The estate has been fully and lawfully administered, and the assets have been distributed in accordance with the law or the applicable instruments governing distribution;
- The events have occurred after which the Court may approve and settle a final account;
- The events have occurred after which the Court may approve and settle a supplemental final account.

The account is therefore approved and settled.

[Check whichever of the following are applicable]

The fiduciary shall be discharged without further order of the Court twelve months following the approval of the final and distributive account unless discharged by this entry.

- The fiduciary is discharged herewith;
- The surety bond is terminated herewith.

Date

Probate Judge