

**PROBATE COURT OF PIKE COUNTY, OHIO**

**IN THE MATTER OF THE**

- WRONGFUL DEATH TRUST
- INTER VIVOS TRUST
- TESTAMENTARY TRUST
- SPECIAL NEEDS TRUST

**OF** \_\_\_\_\_, **DECEASED, GRANTOR**

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

**FIDUCIARY'S ACCEPTANCE TRUSTEE**

I hereby accept the duties which are required of me by law, and such additional duties as are ordered by the Court. As Trustee of this estate I will:

- 1) Make and file an inventory of the real and personal assets of the trust within 3 months after appointment, or such time as extended by the Court.
- 2) Deposit funds which come into my hands in a lawful depository located within this state: The trust checking accounts **must provide canceled checks**, as these canceled checks must be displayed when filing accounts.
- 3) Keep trust funds in separate trust accounts at all times during the administration of the trust;
- 4) Invest all funds in a lawful manner;
- 5) Timely pay bond premium, if any;
- 6) Make and file a 1<sup>st</sup> account within two (2) years following my appointment or such time as ordered by the Court; File additional accounts every two years;
- 7) Timely file all tax documents as required by law;
- 8) Submit all filings with original signatures. In all matters with multiple fiduciaries, the signature of all fiduciaries is required; Persons who are not an attorney may not sign on behalf of an attorney;
- 9) Obey all Orders of the Court; and,
- 10) Immediately notify the Probate Court if I change my address.

I acknowledge that I am subject to possible civil and criminal penalties for improper conversion of the property which I hold as fiduciary.

**NOTE:** ORC§2109.02 states that every fiduciary, before entering into the execution of a trust, shall receive letters of appointment from a Probate Court having jurisdiction of the subject matter of the trust. The duties of a fiduciary shall be those required by law, and such additional duties as the Court orders. Letters of appointment shall not issue until a fiduciary has executed a written acceptance of those duties, acknowledging the possibility of removal for failure to perform those duties, and further being subject to possible penalties for conversion of property held as a fiduciary. The written acceptance of duties may be filed with the application for appointment.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Trustee