

**PROBATE COURT OF DELAWARE COUNTY, OHIO
DAVID A. HEJMANOWSKI, JUDGE**

Estate Timeline Checklist
(02/09/15)

<u>FORMS</u>	<u>ACTION:</u>	<u>Date Due</u>	<u>Completed</u>
2.2	Notice of Probate of Will -Given w/in 2 weeks of admission per RC 2107.19(A)(1) & I/A/W Civ R 73 (E)	_____	_____
2.4	Certificate of Notice of Probate of Will - Sup R 59(B), RC 2107.19(A)(3) due w/in 2 months of Appt. of Fiduciary-filing commences will contest period per RC 2107.76	_____	_____
	Notice of Appt. as Administrator -Served by Admin. on heirs and those entitled to support allowance; per Sup R 60(B) & Loc R 60.1; due to serve w/in 7 days of appt. and proof of service to be filed w/Court	_____	_____
Loc.F. 7.1A	Medicaid Recovery Acknowledgment - due where applicant is not represented by counsel; due before final accounting filed	_____	_____
7.0	Notice to Medicaid Recovery Administrator - If applicable and w/in 30 days of appt. of fiduciary; per RC 2117.061	_____	_____
	Claim of Fiduciary -due to be filed with Court w/in 3 months of appt. per RC 2117.02	_____	_____
6.0; 6.1	Inventory & Schedule of Assets -due w/in 3 months of appt.; per RC 2115.02	_____	_____
Loc.F. 78.2A & 78.2B	Certificate of Service of Notice of Hearing /Inventory - RC 2115.16, Loc R 78.1; Loc F 78.2A accompanied by Waivers (Loc F 78.2B) or proofs of service; due prior to hearing on Inventory	_____	_____
7.1. /7.2	File Family Allowance Apportionment - 5 months of appt. per RC 2106.13(D)	_____	_____
8.2	Election of Surviving Spouse Against Will - w/in 5 months of initial appt. of estate fiduciary; per RC 2106.01(E)	_____	_____
13.8	Application to Extend Administration - Court requires when extension in lieu of Notice to Extend; per RC 2109.301; Sup R 78(B)(2) & Loc R 64.3	_____	_____

Note: This checklist is not definitive of all filing deadlines and applicable procedures and is intended only as a general template. The user is cautioned to verify the current applicable laws, rules, deadlines and procedures for the particular matter before the court.

<u>FORMS</u>	<u>ACTION:</u>	<u>Date Due</u>	<u>Completed</u>
13.0, 13.1 & 13.2	Final Account -per RC 2109.32 & Loc R 64.8; due w/in 6 months of appt. of fiduciary unless extended; <u>NOTE:</u> If extension granted, final account is then due 13 months after date of appointment or as ordered	_____	_____
13.9A	Certificate of Service of Account - accompanied by Waivers or proofs of service; per RC 2109.32 & Loc R 64.9; due prior to hearing on account	_____	_____
	Federal and Ohio Estate Tax Returns - when applicable; w/in 9 months of death, unless extended	_____	_____
ET 22	Certificate of Filing Ohio Estate Tax - due in every estate at time of filing of return; or if no Ohio estate tax return due then prior to closing of estate; a new filing due with each amendment of return; Loc R 75.8	_____	_____

MISCELLANEOUS ACTIONS:

	Surviving Spouse challenge of antenuptial or separation agreement -filed w/in 4 months of appt. of fiduciary; per RC 2116.22	_____	_____
	Period to file claims against estate -File w/in 6 months of death per RC 2117.06; with some exceptions	_____	_____
	Spousal Election to Receive Mansion House - as part of intestate estate per RC 2106.10; election due prior to filing final accounting or earlier death of surviving spouse	_____	_____
	Surviving Spouse Election to Purchase Personal Property at appraised value - due w/in 1 month of approval of inventory; per RC 2106.16	_____	_____
	Will Contest -may be filed not later than 3 months after the filing of Certificate Notice of Probate of Will; per RC 2107.76	_____	_____
	Suit on Rejected Claim -action must be commenced by claimant in a court of general jurisdiction w/in 2 months after the rejection; Per RC2117.12	_____	_____

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<u>FORMS</u>	<u>ACTION:</u>	<u>Date Due</u>	<u>Completed</u>
	Report of Newly Discovered Assets- per RC 2113.69; Report to Court w/I 30 days of Discovery	_____	_____

The Forms and Local Rules are available on the Delaware County Probate Court Website at -
<http://www.co.delaware.oh.us/court/probate/>

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