

CHECKLIST

TESTAMENTARY TRUST

Initial Filing Fee:

Court Costs: \$120.00

Requirements:

Established through a Last Will and Testament of a decedent that has been admitted to probate in Delaware County, Ohio.

E-Filing Process:

When the following documents are accepted by the Court, the Court will contact the applicant to set a time for Trustee to appear in Probate Court (a) to sign Oath and (b) receive Letters.

Checklist:

- Application for Appointment of Trustee (DCPC Form)**
- Trust Beneficiaries (including birth dates of minors)**
- Record Check Authorization, Waiver and Consent (DCPC Form 17.10)**
- Non-Public Record Social Security Information (DCPC Form 17.11)**
- Trustee's Acceptance**
- Copy of Picture ID of the Applicant**
- Copy of the Will Creating the Testamentary Trust**
- Bond (if applicable)**