

**RULES OF PRACTICE
SENECA COUNTY COURT OF COMMON PLEAS
PROBATE DIVISION**

JAY A. MEYER, JUDGE

EFFECTIVE

February 1, 2025

IMPORTANT

THESE RULES APPLY EQUALLY TO EVERY PERSON INVOLVED IN A PROCEEDING IN SENECA COUNTY PROBATE COURT, REGARDLESS OF WHETHER THE PERSON IS OR IS NOT REPRESENTED BY AN ATTORNEY. THERE ARE NO SPECIAL EXCEPTIONS OR MORE LENIENT STANDARDS FOR PERSONS WHO REPRESENT THEMSELVES AND OPT TO PROCEED WITHOUT THE ASSISTANCE OF LEGAL COUNSEL.

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**IN THE COURT OF COMMON PLEAS OF
SENECA COUNTY, OHIO
PROBATE DIVISION**

**RULES OF SUPERINTENDENCE AND LOCAL RULES OF COURT
RULE 5**

(LOCAL RULES)

(A) Adoption of local rules.

- (1) Nothing in these rules prevents the adoption of any local rule of practice that promotes the use of any device or procedure to facilitate the expeditious disposition of cases. Local rules of practice shall not be inconsistent with rules promulgated by the Supreme Court.
- (2) A local rule of practice shall be adopted only after the Court or division provides appropriate notice and an opportunity to comment on the proposed rule. If the Court or division determines that there is an immediate need for the rule, the Court or division may adopt the rule without prior notice and opportunity for comment, but promptly shall afford notice and opportunity for comment.
- (3) Upon adoption, the Court or division shall file a local rule of practice with its clerk and the clerk of the Supreme Court. On or before the first day of February of each year, each Court or division of a Court shall do one of the following:
 - (a) File with the clerk of the Supreme Court a complete copy of all local rules of the Court or division in effect on the immediately preceding first day of January.
 - (b) Certify to the clerk of the Supreme Court that there were no changes in the immediately preceding calendar year to the local rules of the Court or division.

- (B)** In addition to local rules of practice adopted pursuant to division (A)(1) of this rule and any other Rule of Superintendence, each Court or division, as applicable, shall adopt the following by local rule:

A case management plan for the purposes of ensuring the readiness of cases for pretrial and trial, and maintaining and improving the timely disposition of cases. In addition to any other provisions necessary to satisfy the purposes of division (B)(1) of this rule, the plan shall include provisions for an early case management conference,

referral to appropriate and available alternative dispute resolution programs, establishment of a binding case management schedule, and a pretrial conference in cases where the trial Judge determines a conference is necessary and appropriate. A municipal or county Court may establish separate provisions or exceptions from the plan for small claims, traffic, and other types of cases that the Court determines would not benefit from the case management plan.

- (1) Jury management plan for purposes of ensuring the efficient and effective use and management of jury resources. In addition to any other provisions necessary to satisfy the purposes of division (B)(2) of this rule, the plan shall address the provisions of the Ohio Trial Court Jury Use and Management Standards adopted by the Supreme Court of Ohio on August 16, 1993.

LOC R. 5.1 (TECHNOLOGY PLAN)

As required by Superintendence Rule 5 (E) the Court adopts the following technology plan for the purposes of ensuring the efficient and effective use of technology in the delivery of services of the Court.

The intent of this rule is to promote uniformity in the practices and procedures related to the use of technology in cases where such appearances are permitted by these rules, court order, statutory or other rules of court.

Notwithstanding any other provisions of this rule, the judge may order a party's personal appearance in the court for any pretrial conference, hearing, or proceeding. For all proceedings, the court may require a party to appear in person, including at a pretrial conference, hearing, or proceeding in which a telephone or video appearance is otherwise permitted if the court determines that a personal appearance would materially assist in the determination of the proceedings or in the effective management or resolution of a particular case.

A. Telephone Appearances

The court on its own motion or upon the request of any party may in its discretion conduct pretrial conferences, hearings, and proceedings via telephone with attorneys and unrepresented parties.

If approved by the court, a party may appear by telephone at the pretrial conferences, hearings, and proceedings.

Parties who wish to appear via telephone shall file a motion or request for remote hearing at least seven days prior to the scheduled hearing in nonemergency cases.

All telephone appearances must be recorded and reported to the same extent as if the participants had appeared in person for the particular type of hearing conducted.

The court will specify:

- (a) The time and the person who will initiate the telephone call;
- (b) Any other matter or requirement necessary to accomplish or facilitate the telephone proceeding.

Upon convening a proceeding involving telephone appearance, the court shall proceed in the same manner in which it would proceed if the proceeding was in-person. proceeding.

If at any time during a hearing, conference, or proceeding conducted by telephone the court determines that a personal appearance, including video conferencing, is necessary, the court may continue the matter and require a personal appearance.

B. Video Appearances

The court on its own motion or upon the request of any party may in its discretion conduct pretrial conferences, hearings, or proceedings by the use of a live two-way video and audio-conferencing platform with attorneys and unrepresented parties.

If approved by the court, a party may appear by video at the pretrial conferences, hearings, and proceedings.

Parties who wish to appear via video shall file a motion or request for remote hearing at least seven days prior to the scheduled hearing in nonemergency cases.

All video appearances must be recorded and reported to the same extent as if the participants had appeared in person for the particular type of hearing conducted.

The court may specify:

- (a) The time and the link and or telephone number by which the individual can join the proceeding;
- (b) Any other matter or requirement necessary to accomplish or facilitate the proceeding -- including the providing of email addresses or other links within sufficient time to enable the video appearance.

Upon convening a proceeding involving a video appearance, the court shall proceed in the same manner as if the proceeding was being conducted in-person based on the type of proceeding.

If at any time during a pretrial conference, hearing, or proceeding conducted by video-conferencing the court determines that a personal appearance, is necessary, the court may continue the matter and require a personal appearance.

C. Hybrid Appearances

The Court on its own motion or upon the request of any party may in its discretion conduct pre-trial conferences, hearings or proceedings by any combination of in-person, audio or video appearances if the court determines it is appropriate. The court will follow the above-stated procedures and guidelines depending on the medium used.

D. Confidential Attorney-Client Communication

As necessary, provisions shall be made to preserve the confidentiality of attorney-client communications and privilege.

E. Technical Standards and Equipment

The equipment and platform used in any hearing or proceeding conducted under this rule must conform to the following minimum requirements in order to allow all participants, regardless of disability or other barriers, to participate in proceedings:

All participants must be able to see and/or hear and communicate with each other simultaneously.

All participants must be able to see, hear, or otherwise observe any documents, physical evidence, or exhibits presented during the proceedings, either by video, facsimile, or other method.

The telephonic or audiovisual technology may be digitally recorded and may be transcribed at the request and cost of any party.

The use of telephonic or audiovisual technology in conducting hearings and proceedings shall in no way abridge any right of the public.

Reasonable accommodations will be made for any disabled person wishing to appear remotely. Requests for these accommodations shall be included with the motion for remote appearance.

F. Electronic Signatures

Electronic Signatures shall not be permitted on any filings without prior Court approval.

G. Use of other forms of technology not specifically addressed in this rule may be permitted upon the application of any party, approval of the court, and agreement of all parties deemed necessary to the proceeding by the judge.

H. Instructions on how to use an approved technology are available upon request.

SUP. R. 9 SECURITY PLAN

- (A) For purposes of ensuring security in court facilities, each court should develop and implement a court security policy and procedures plan. In addition to any other provisions necessary to satisfy the purposes of this rule, the plan shall address the provisions of the Ohio Court Security Standards adopted by the Supreme Court of Ohio on October 17, 1994. The plan shall not be a public record.
- (B) For purposes of ensuring security in court facilities, information describing the type or level of security in a building in which court is conducted and that is contained in a court security review conducted by a local court or the Supreme Court shall not be a public record.

LOC R. 9.1 (PLAN CONFIDENTIALITY)

- 1. Pursuant to a Supreme Court of Ohio resolution dated July 26, 1995, the Seneca County Probate Court has determined the entire Security Plan as submitted to the Supreme Court of Ohio, effective June 26, 1995, be maintained as confidential and not a matter of public record.

LOC. R. 9.2 (WEAPONS PROHIBITION)

- (A) No person shall have on his or her person or under his or her control any dangerous weapon or dangerous ordinance other than law enforcement officers and Court Bailiffs on official business. Any person within the confines of the courthouse shall be subject to search at any time by the Sheriff of Seneca County, Ohio. The sheriff or his deputies are allowed to search any and all spectators at his discretion.

SUP. R. 11 RECORD OF PROCEEDINGS

The court herein adopts Superintendence Rule 11.

**LOC. R. 11.1
(RECORD OF PROCEEDINGS)**

- (B) The Court records all hearings electronically. The audio-electronic recording shall be the official record. A transcript of the audio-electronic recording may be requested by proper motion. In addition, any party, at that party's own expense, may provide a court reporter.
- B. A transcription of the record shall be made at the expense of the person requesting such transcription unless otherwise ordered by the Court. The transcription shall be made by an agent of the Court. The agent shall charge the customary fee charged by a private reporter for services in Seneca County for such transcription or as otherwise provided for by Seneca County Common Pleas Local Rule. Transcripts will be released upon payment of the transcription fee. Failure to timely pay the fee may result in sanctions being issued by the Court against the person who ordered the transcript.
- C. The original CD or other recording device of the audio-electronic recording shall be maintained by the court for a period of 1 year from journalization of the final entry or judgment in the case. However, if a written request for transcription has been made, the original CD or other recording device shall become part of the record of proceedings.

SUP. R. 12 CONDITIONS FOR BROADCASTING AND PHOTOGRAPHING COURT PROCEEDINGS

The Court herein adopts Superintendence Rule 12.

**LOC. R. 12.1
(MEDIA COVERAGE OF COURT PROCEEDINGS)**

(A) Presiding Judge

(1) Consistent with Rule 12 of the Rules of Superintendence for the Courts of Ohio, requests for permission to broadcast, televise, photograph or otherwise record Court proceedings that are open to the public as provided by Ohio law, shall be made in writing to the Judge presiding over the proceeding. The written application and order of

the Judge granting or denying such application shall be made part of the record of the proceedings.

- (2) Requests shall be made on a form “Application Requesting Permission to Broadcast, Televis, Photograph or Record Courtroom Proceedings” available through Appendix N. Applications shall be made as far in advance as possible but not less than 24 hours prior to the courtroom session to be recorded. The Judge may waive advance notice for good cause.
- (3) Only representatives of federally licensed broadcast or cable media outlets (licensed by the Federal Communications Commission) or a member of the Associated Press, Reuters, or otherwise nationally recognized news/wire service or local print or internet media business entities who regularly report on cases occurring in the Seneca County Probate Court (collectively “Authorized Media Representatives”) shall be permitted to submit a Media Application.
- (4) After consultation with the media, the Judge shall specify the place or places in the courtroom where the operators and equipment are to be positioned.

(B) Permissible Equipment and Operators

- (1) Use of more than one portable television, videotape or movie camera with one operator shall be allowed only with permission of the Judge.
- (2) Not more than one still photographer shall be permitted to photograph Court proceedings without permission of the Judge. Still photographers shall be limited to two cameras with two lenses for each camera.
- (3) For radio broadcast purposes, not more than one audio system shall be permitted in Court. Where available and suitable, existing audio pickup systems in the Court facility shall be used by the media. If existing audio pickup systems are not available, microphones and other electronic equipment necessary for the audio pickup shall be as inconspicuous as possible but shall be visible.
- (4) Visible audio recording equipment may be used by news media reporters with the prior permission of the Judge.
- (5) Arrangements between or among media for “pooling” of equipment shall be the responsibility of the media representative(s) authorized to cover the proceedings. “Pooling” arrangements are to be made outside the courtroom and without imposing on the Judge or Court personnel. If disputes arise over arrangements between or among media representatives, the Judge may exclude all contesting representatives from the proceedings.

- (6) The Judge shall prohibit the use of electronic or photographic equipment that produces distracting sound or light. No artificial lighting other than that normally used in the courtroom shall be employed, provided that, if the normal lighting in the courtroom can be improved without becoming obtrusive, the Judge may permit the modification.
- (7) Still photographers and television and radio representatives shall be afforded a clear view but shall not be permitted to move about in the courtroom during court proceedings from the places where they have been positioned by the Judge, except to leave or enter the courtroom.

(C) Limitations

- (1) There shall be no audio pickup or broadcast of conferences conducted in a court facility between attorneys and clients or co-counsel or of conferences conducted at the bench between counsel and the Judge.
- (2) The Judge shall inform victims and witnesses of their right to object to being filmed, videotaped, recorded, or photographed.
- (3) Unless permitted by the judge, there shall be no filming, videotaping, recording, or photographing of jurors or prospective jurors. In courtrooms where the filming, videotaping, recording, or photographing of trial participants is impossible without including the jury as part of the background, it shall be permitted only when individual jurors cannot be identified. Close-ups identifying individual jurors shall be prohibited.
- (4) Media representatives shall not be permitted to transmit or record anything other than the court proceedings from the courtroom while the court is in session.
- (5) Except when expressly permitted by a Seneca County Judge under this Rule, recordings shall not be made by anyone anywhere in the Courthouse shall include the following:

- (a) Take or record a photograph, video, or other visual image, or;
- (b) Record, transmit, or receive audio or sound

(D) Revocation of Permission

Upon the failure of any media representative to comply with the conditions prescribed by this rule or the Judge, the Judge may revoke the permission to broadcast or photograph the Court proceedings.

SUP R. 16 MEDIATION
(Effective January 1, 2020)

LOC. R. 16.01
(GENERAL)

(A) The Court of Common Pleas, Probate Division incorporates by reference Ohio Revised Code Chapter 2710 – the “Uniform Mediation Act,” including all definitions contained therein, as well as Rule 16 of the Ohio Rules of Superintendence.

(B) The Seneca County Court of Common Pleas, Probate Division has discretion to encourage parties to use mediation in civil cases filed in this Court, with the exception of the specific cases specifically excluded from mediation more particularly described below. A case may be submitted to mediation as provided in this rule.

(C) Exceptions:

Mediation is prohibited in the following circumstances:

1. As an alternative to the prosecution or adjudication of domestic violence;
2. In determining whether to grant, modify, or terminate a protection order;
3. In determining the terms and conditions of a protection order; and
4. In determining the penalty for violation of a protection order.

The following actions shall be exempted from mediation services upon the request of any party and with the permission of the Court:

1. Cases in which one party has been convicted of, or plead guilty to a violation of Ohio Revised Code §2919.25 (domestic violence) within the past two (2) years, or when a civil temporary protection order is in effect;
2. Cases in which the physical distance between parties is so great that it is not feasible for them to participate in mediation sessions;
3. Cases in which one party is mentally ill;

4. In emergency circumstances requiring an immediate hearing by the Court; and

5. Cases in which the parties have achieved an executed Agreed Judgment Entry.

Mediation services are not available for cases involving abuse, neglect, dependency, unruly, delinquency, and juvenile civil protection orders.

Nothing in this division shall prohibit the use of mediation in a subsequent divorce or custody case, even though that case may result in the termination of the provisions of a protection order, or in a juvenile court delinquency case, even though the case involves juvenile-perpetrated domestic violence.

LOC. R. 16.02
(CONFIDENTIALITY)

(A) General. All mediation communications related to or made during the mediation process are subject to and governed by the Uniform Mediation Act. With the exception of the communications specifically set forth in division 16.02(B) below, mediation communications are confidential, and no one shall disclose any of these communications unless all parties and the Mediator consent to disclosure. This Court may impose penalties for any improper disclosures made in violation of this rule. Disputes regarding confidentiality should be first addressed with the Mediator when possible.

By participating in mediation, a nonparty participant, as defined in Ohio Revised Code §2710.01(D), submits to the Court's jurisdiction to the extent necessary for enforcement of this rule. Any nonparty participant shall have the rights and duties under this rule attributed to parties, except that no evidence privilege shall be expanded.

(B) Exceptions. All mediation communications are confidential with the following exceptions:

1. Parties may share all mediation communications with their attorneys;
2. Certain threats of abuse or neglect of a child or an adult;
3. Statements made during the mediation process to plan or hide an ongoing crime;
and
4. Statements made during the mediation process that reveal a felony.

LOC. R. 16.03
(REFERRAL TO RESOURCES)

The Seneca County Probate Court Chief Deputy Clerk shall maintain resources for mediation parties, including victims and suspected victims of domestic violence, encouraging appropriate referrals to legal counsel and other support services such as Children's Services, domestic violence prevention, counseling, substance abuse, and mental health services.

LOC. R. 16.04
(CASE SELECTION)

(A) A case in the Probate Division may be referred to mediation in the following manner:

1. The Judge or Magistrate may refer a case for mediation by Court Order; and
2. Upon written or oral motion, the Court may refer the matter to mediation.

(B) The Court Mediator will determine the eligibility and appropriateness of each referral prior to the commencement of the mediation process. The Court Mediator may decline any referral.

(C) All parties shall advise the assigned Judge or Magistrate of any domestic violence allegations known to them to exist or to have existed in the past, or which may become known to them following entry of the Order to Mediation but before conclusion of all mediation proceedings, which allegations involve any two or more persons whose attendance is required by the referral Order.

(D) The mediation shall be commenced via a "Notice of Scheduled Mediation" which shall, at minimum, indicate the date, time, place of mediation, and contact information for the Mediator.

**LOC. R. 16.05
(PROCEDURE)**

(C) The Court shall utilize procedures for all cases that will:

1. Ensure that parties are allowed to participate in mediation, and if the parties wish, that their attorneys and other individuals they designate are allowed to accompany them and participate in mediation;
2. Screen for domestic violence both before and during mediation; and
3. Encourage appropriate referrals to legal counsel and other support services for all parties including victims of and suspected victims of domestic violence.

(D) The mediation of cases wherein violence or fear of violence is alleged, suspected, or present, may proceed only if all of the following conditions are satisfied:

1. The person who is or may be the victim of domestic violence is fully informed, both orally and in writing, about the mediation process, his or her right to decline participation in the mediation process, and his or her ability to have a support person, in addition to an attorney, present at mediation sessions;
2. The parties have the capacity to mediate without fear of coercion or control;
3. Appropriate procedures are in place to provide for the safety of the person who is or may be the victim of domestic violence and all other persons present at the mediation;
4. Procedures are in place for the Mediator to terminate the mediation if he or she believes that there is a continued threat of domestic violence or coercion between the parties; and
5. Procedures are in place for issuing written findings of fact, as required by Ohio Revised Code §3109.052, to refer certain cases involving domestic violence to mediation.

LOC. R. 16.06
(MEDIATION CASE SUMMARY)

Each party shall submit to the Mediator a summary of facts and circumstances of the Dispute, together with any arguments in support of that party's case, no later than two weeks prior to the scheduled mediation. Parties may provide any additional information or material which they believe will aid the Mediator in understanding the dispute or which the Mediator requests relevant to the issues at hand.

LOC. R. 16.07
(REPORT OF MEDIATOR)

At the conclusion of any mediation, the Mediator will inform the Court, in compliance with Ohio Revised Code §2710.06, who attended the mediation and whether the case has settled. This report shall be submitted by the Mediator within 10 days of the conclusion of the mediation.

LOC. R. 16.08
(EFFECT OF ONGOING COURT ORDERS IN MEDIATION)

Ongoing Court Orders such as discovery or temporary Orders remain in effect throughout the mediation process. Further, specific Orders of the Court as to a particular case may supersede these general mediation rules.

LOC. R. 16.09
(QUALIFICATIONS)

(E) General Qualifications and Training.

A Mediator shall meet the qualifications of and comply with all training requirements of Sup.R. 16.23 and adopted pursuant to Sup.R. 16.21 governing Mediators and mediation, as well as meet all of the following qualifications:

1. Except as provided in division (A)(2) of this rule, a Mediator shall complete "Fundamentals of Mediation Training" approved by the Supreme Court Dispute Resolution Section in accordance with standards established by the Commission on Dispute Resolution.

2. A Mediator shall not be required to complete “Fundamentals of Mediation Training” if any of the following apply:
 - a. Prior to January 1, 2020, the Mediator has completed at least twelve hours of basic mediation training;
 - b. Prior to January 1, 2020, the Mediator has served as a full-time Mediator for a minimum of three years or mediated at least forty-five cases, in which case the Mediator shall complete the “Advanced Mediation Workshop” approved by the Supreme Court Dispute Resolution Section in accordance with standards established by the Commission on Dispute Resolution; or
 - c. The Mediator is a law student enrolled in a clinical mediation or dispute resolution program at an American Bar Association accredited law school, has completed mandatory coursework in fundamental mediation topics, and mediates under the supervision of faculty at the law school.

(F) Specialized Training

1. Prior to accepting a referral from the Court for disputes involving the allocation of parental rights and responsibilities or the care of or visitation with minor children, a Mediator shall:
 - a. Possess a bachelor’s degree, or equivalent educational experience as is satisfactory to the Court, and at least two years of professional experience with families. “Professional experience with families” includes mediation, counseling, casework, legal representation in family law matters, or such other equivalent experience satisfactory to the Court;
 - b. Comply with the requirements of division (A) of this rule;
 - c. Complete “Specialized Family or Divorce Mediation Training” approved by the Supreme Court Dispute Resolution Section in accordance with standards established by the Commission on Dispute Resolution; and
 - d. Complete “Specialized Domestic Abuse Issues and Mediation Training” approved by the Supreme Court Dispute Resolution Section in accordance with standards established by the Commission on Dispute Resolution unless either of the following apply:

- 1) The Mediator is co-mediating with another Mediator who has completed the training; or
 - 2) The Mediator is a law student enrolled in a clinical mediation or dispute resolution program at an American Bar Association accredited law school, has completed mandatory coursework in fundamental and domestic abuse mediation topics, and mediates under the supervision of faculty at the law school who has completed the training.
2. Prior to accepting a referral from the Court for disputes involving school attendance mediation, a Mediator shall meet either of the following qualifications:
- a. Complete the requirements of division (A) of this rule; or
 - b. Complete “School Attendance Mediation Training” approved by the Supreme Court Dispute Resolution Section in accordance with standards established by the Commission on Dispute Resolution.

SUP. R. 26 RECORD RETENTION

The Seneca County Probate Court has adopted the Local Record Retention Schedule attached as Appendix I, which will be followed in conjunction with Rule 26 of the Rules of Superintendence for the Courts of Ohio.

SUP. R. 53 HOURS OF THE COURT

Each Court shall establish hours for the transaction of business.

LOC. R. 53.1 (HOURS OF THE COURT)

The Probate Court and its offices shall be open for the transaction of business from 8:30 A.M. to 4:30 P.M. daily except Saturday, Sunday, and the following: Martin Luther King Day, President’s Day, Good Friday, Memorial Day, Juneteenth, 4th of July, Labor Day, Columbus Day, Veteran’s Day, Thanksgiving Day and the day after, close at noon on Christmas Eve, Christmas Day, and New Year’s Day.

SUP. R. 54 CONDUCT IN THE COURT

- (G) Proper decorum in the Court is necessary to the administration of the Court's function. Any conduct that interferes or tends to interfere with the proper administration of the Court's business is prohibited.
- (H) No radio or television transmission, voice recording device, other than a device used by a Court reporter making a record in a proceeding, or the making or taking of pictures shall be permitted without the express consent of the Court in advance and pursuant to Sup. R. 12.

LOC. R. 54.01 (TIMELINESS)

All attorneys shall be on time for all court appearances.

LOC. R. 54.02 (ATTIRE)

All attorneys, parties and witnesses should wear appropriate attire to Court. The Court considers appropriate attire as clothing Seneca County residents would wear to important events in their lives. Counsel should ensure that their clients and witnesses are appropriately attired. Failure of such may result in the hearing or trial being postponed and costs assessed.

LOC. R. 54.03 (ADDRESSING THE COURT)

Attorneys may remain seated when addressing the Court unless otherwise directed by the Court.

LOC. R. 54.04 (SMOKING)

No smoking is allowed in any of the Court's offices, conference rooms, courtrooms or general vicinity.

**LOC. R. 54.05
(BEHAVIOR)**

The Court will not tolerate any inappropriate facial expression, grimaces or gestures during any Court appearance. Rude and disrespectful behavior toward opposing counsel, parties, witnesses, jurors or Court staff will not be tolerated. Any of these actions may be considered by the Court as direct Contempt.

**LOC. R. 54.06
(EXPARTE COMMUNICATIONS WITH JUDGE OR MAGISTRATE)**

- (A) No attorney or party shall discuss, or attempt to discuss, the merits, either orally or in writing, of any litigation with any Judge or Magistrate presiding over the matter before final disposition thereof without the presence of opposing counsel, or the unrepresented party.
- (B) Letters received by the Court shall not be accepted as an attempted form of direct communication with the Judge or Magistrate. Any letter, e-mail, or facsimile will be returned to the party or destroyed.

SUP. R. 55 EXAMINATION OF PROBATE RECORDS

- (A) Open records shall not be removed from the Court. All other cases may be removed when approved by the Judge or Clerk. Violation of this rule may result in the issuance of a citation for contempt. Cases must be returned within 7 days.
- (B) Copies of records may be obtained at a cost per page as authorized by the Judge.
- (C) Adoption, mental illness, and mental retardation proceedings are confidential. Records of those proceedings, and other records that are confidential by statute, may be accessed as authorized by the Judge.
- (D) A citation for contempt of Court may be issued against anyone who divulges or receives information from confidential records without authorization of the Judge.

**LOC. R. 55.1
(UNCERTIFIED COPIES)**

Uncertified copies of any public record may be obtained at the cost of \$.05 per page.

LOC. R. 55.2
(PUBLIC RECORDS POLICY)

It is the policy of the Seneca County Common Pleas Court Probate Division, to adhere to Ohio's Public Records Act and to those portions of the Ohio Revised Code and the Rules of Superintendence (and any amendments thereto), that require certain records to remain confidential. Any denial of public records in response to a valid request must be accompanied by an explanation. If the request is in writing, the explanation must also be in writing.

A. Public Records

This court, in accordance with the Ohio Revised Code, defines records as including the following: any document paper, electronic (including, but not limited to e-mail), or other format – that is created or received by, or comes under the jurisdiction of a public office that documents the organization, functions, policies, decisions, procedures, operations, or other activities of the office. All records of this court are public record unless confidential or otherwise exempt from disclosure under the Ohio Revised Code or the Rules of Superintendence (and any amendments thereto).

- B. It is the policy of this court that, as required by Ohio law, records will be organized and maintained so that they are readily available for inspection and copying. Record retention scheduled are to be updated regularly and posted prominently.
- C. Certain records kept by this court are excluded from public inspection by applicable provisions of the Ohio Revised Code and the Rules of Superintendence, if applicable, (and any amendments thereto), and shall not be released to the general public. These records include, but are not limited to:
1. Adoption records or documents (R.C. 149.43(A)(1)(d);
 2. Judges or Magistrate's trial notes (R.C. 149.43(A)(1)(g);
 3. Putative Father Registry information (R.C. 149.43(A)(1)(e);
 4. Estate tax returns in the possession of the Probate Court, Department of Taxation, County Auditor, Country Treasurer and Ohio Attorney General (R.C. 5731.90);
 5. Medical records which include documents pertaining to Medical history, diagnosis, prognosis, or medical condition of a patient including psychiatric history, diagnosis and

prognosis (R.C. 149.43(A)(1)(a);

6. Confidential law enforcement investigatory records (R.C. 149.43(A)(1)(h);
7. Records the release of which is prohibited by state or Federal law (R.C. 149.43(A)(1)(v).

D. Each request for public records should be evaluated for a response using the following guidelines:

1. Although no specific language is required to make a request, the requestor must at least identify the records requested with sufficient clarity to allow the court to identify, retrieve, and review the records. If it is not clear what records are being sought, the records custodian must contact the requestor for clarification, and should assist the requestor in revising the request by informing the requestor of the manner in which the office keeps its records.
2. The requestor does not have to put a records request in writing, and does not have to provide his or her identity or the intended use of the requested public record. It is this court's general policy that this information is not to be requested.
3. Public records are to be available for inspection during regular business hours, with the exception of holidays. public records must be made available for inspection promptly. Copies of public records must be made available within a reasonable period of time. "Prompt and "reasonable" take into account the volume of records requested; the proximity of the location where the records are stored; the accessibility of the records; and, the necessity for any legal review of the records requested.
4. Each request should be evaluated for any estimated length of time required to gather the records. Routine requests for records should be satisfied immediately if feasible to do so. all requests for public records must either be satisfied or be acknowledged in writing by the court within five (5) business days following the court's receipt of the request. If a request is deemed significantly beyond "routine", such as seeking a voluminous number of copies or requiring extensive research, the acknowledgement must include the following: i) an estimated

number of business days it will take to satisfy the request, ii) an estimated cost if copies are requested; and iii) any items within the request that may be exempt from disclosure.

5. Any denial of public records must include an explanation. If portions of a record are public and portions are exempt, the Exempt portions are to be redacted and the remainder released, if permitted by Ohio law. If there are redactions, each redaction must be accompanied by a supporting explanation.
6. Those seeking public records will be charged only the actual cost of making copies. Requestors may ask that documents be mailed to them. They will be charged the actual cost of the postage and mailing supplied.
7. Documents in electronic mail format are records as defined in the Ohio Revised Code when their content relates to the business of the court and is not confidential or otherwise exempt by applicable Ohio law or the Rules of Superintendence, or any amendments thereto. E-mail is to be treated in the same fashion as records in other formats and should follow the same retention schedules.
8. Records in private e-mail accounts used to conduct public business are subject to disclosure, and all employees or representatives of the court are instructed to retain their e-mails that relate to public business and to copy them to their business e-mail accounts and/or to the court's records custodian.
9. This policy applies to all departments of the Probate Division.

LOC. R. 55.3
(SOCIAL SECURITY NUMBERS/ACCOUNT NUMBERS)

- A. Social security numbers are confidential and the full social security number shall not be filed in any filing in this court that is available for inspection by the general public. It is the responsibility of the person filing the public record document to comply with this rule and to redact the public record document before filing to conform to this rule. Social security numbers disclosed on marriage applications and estate tax returns are sequestered as confidential non-public records.
- B. All financial account numbers in any public record document filed in this court shall disclose only the last four digits of the account number. It is the responsibility of the

person filing the document to redact the remaining digits of the account number.

SUP. R. 56 CONTINUANCES & REQUEST FOR EXTENSION OF TIME

- (A) Motions for continuance and extension of time shall be submitted in writing with the with the proper caption and case number.
- (B) Except on motion of the Court, no continuance and extension of time shall be granted in the absence of proof of reasonable notice to, or consent by, the adverse party or the party's counsel. Failure to object to the continuance within a reasonable time after receiving notice shall be considered consent to the continuance.
- (C) A proposed entry shall be filed with a motion for continuance or extension of time, leaving the time and date blank for the Court to set a new date.

LOC. R. 56.1 (SIGNATURE)

All applications for extensions of time must be signed by both the fiduciary and the attorney of record pursuant to Sup. R. 78.

LOC. R. 56.2 (TIMELINESS)

All applications for continuances of hearings, pretrials and trials shall be submitted to the Court at least 7 days prior to the scheduled date for the event sought to be continued, absent emergency or cause deemed sufficient by the Court.

SUP. R. 57 FILINGS AND JUDGMENT ENTRIES

- (A) All filings, except wills, shall be on eight and one-half by eleven-inch paper, without backings, of stock that can be microfilmed.
- (B) All filings shall contain the name, address, telephone number, and attorney registration number of the individual counsel representing the fiduciary and, in the absence of counsel, the name, address, and telephone number of the fiduciary. Any filing not containing the above requirements may be refused.

- (C) Failure of the fiduciary to notify the Court of the fiduciary's current address shall be grounds for removal. Not less than ten days written notice of the hearing to remove shall be given to the fiduciary by regular mail at the last address contained in the case file or by other method of service as the Court may direct.
- (D) Filings containing partially or wholly illegible signatures of counsel, parties or officers administering oaths may be refused, or, if filed, may be stricken, unless the typewritten or printed name of the person whose signature is purported to appear is clearly indicated on the filing.
- (E) All pleadings, motions, or other filings are to be typed or printed in ink and correctly captioned. Headings must be positioned 4 (four) inches from the top of the page.
- (F) Unless the Court otherwise directs, counsel for the party in whose favor a judgment is rendered, shall prepare the proposed judgment entry and submit the original to the Court with a copy to counsel for the opposing party. The proposed judgment entry shall be submitted within seven days after the judgment is rendered. Counsel for the opposing party shall have seven days to object to the Court. If the party in whose favor a judgment is rendered fails to comply with this division, the matter may be dismissed or the Court may prepare and file the appropriate entry.
- (G) The Court will not accept for filing any pleading or document which contains the social security number of an individual absent prior Court approval.
- (H) Signatures of filings should be signed in blue ink.

LOC R. 57.1 (FILINGS)

All documents filed in this Court must be typed on a typewriter or computer or written legibly in blue ink. However, documents filed as attachments to previously prepared exhibits which must be submitted in their original form are excluded from this Rule. The Court may decline to accept any filing that fails to comply with these requirements and may ask for resubmission.

LOC. R. 57.2 (REQUIRED INFORMATION)

The attorney's Supreme Court registration number, along with the attorney's name, address, telephone number, telefax number and business email address must be included on all filings (including the accounts). This information is required before a case can be entered in the computer.

LOC. R. 57.3
(SIGNATURES IDENTIFICATION)

All signatures of counsel, parties or officers administering oaths must include the signator's typewritten or clearly printed names under the signature on the filing, with the following exceptions:

1. Non-original signatures are permitted as provided by special administrative order.
2. Signatures on documents filed via the Court's eFiling system or via facsimile shall follow the signature guidelines set forth in Local Rule 75.8 governing eFiling and facsimile filing.

LOC. R. 57.4
(DISPENSE WITH FURTHER ADMINISTRATION)

Where an estate is opened for purposes of admitting the will only or filing an estate tax return only or both and no further administration is contemplated, the attorney shall so advise the Court in writing at the time of filing.

LOC. R. 57.5
(FORMS REQUIRED FOR AN ADOPTION)

1. The original petition for adoption, form 18.0.
2. Certified copy of birth certificate.
3. Consents, form 18.3.
 - Consent of CASA
 - Consent of Judge if permanent custody
 - Consent of agency – if agency placed
 - Consent to be signed by biological mother
 - Consent to be signed by biological father
 - Consent of minor age 12 years or older must be executed in the presence of the court
4. Entry Finding Consent not necessary, form 18.4.
5. Affidavit for Publication and Order for Publication – to be filed if publication is necessary.

6. Petitioner's Account, form 18.9.
7. Orders for Hearing, Notice and for Appointment of Investigator, form 18.1.
8. Final Order of Adoption, form 18.7.
9. Certificate of Adoption – State of Ohio Department of Health, form HEA 2757.
(2 required)
10. Adoption Certificate for Parents, form 18.8. (2 required)
11. Statement of Adopted Person (2 required)
12. Disclosure Statement (not needed on step-parent adoption)

LOC. R. 57.6
(FORMS REQUIRED FOR TESTATE ESTATES)

1. Original will.
2. Application to Probate Will, form 2.0.
3. Surviving Spouse, Next of Kin, form 1.0.
4. Certificate of Service of Notice of Probate of Will, form 2.4.
5. Waiver of Notice of Probate of Will, form 2.1.
6. Notice of Probate of Will, form 2.2.
7. Appointment of Appraiser, form 3.0.
8. Application for Authority to Administer, form 4.0.
9. Fiduciary's bond, form 4.2 if necessary.
10. Waiver of Right to Administer, if necessary, form 4.3.
11. Notice of Hearing on Appointment of Fiduciary, form 4.4 (if necessary)
12. Entry Appointing Fiduciary, Letters of Authority, form 4.5. (2 entries required)

LOC. R. 57.7
(FORMS REQUIRED FOR INTESTATE ESTATE)

1. Application for Authority to Administer, form 4.0.
2. Surviving Spouse, Next of Kin, form 1.0.
3. Fiduciary's bond, form 4.2
4. Waiver of Right to Administer, form 4.3.
5. Notice of Hearing on Appointment of Fiduciary, form 4.4. (if necessary)
6. Appointment of Fiduciary, Letters of Authority, form 4.5. (2 entries required)

LOC. R. 57.8
(FORMS REQUIRED FOR RELEASE ADMINISTRATION)

1. Application to Relieve Estate from Administration, form 5.0.
2. Surviving Spouse, Next of Kin, form 1.0.
3. Assets & Liabilities of Estate to be Relieved from Administration, form 5.1.
4. Waiver of Notice of Application to Relieve Estate from Administration, form 5.2.
5. Notice of Application to Relieve Estate, if needed, form 5.3.
6. Entry Relieving Estate from Administration, form 5.6. (2 entries required)
7. Report of Distribution, form 5.9.

LOC. R. 57.9
(FORMS REQUIRED FOR FILING A SUMMARY RELEASE)

1. Application for Summary Release from Administration, form 5.10.
2. Surviving Spouse, Next of Kin, form 1.0.

3. Entry Granting Summary Release from Administration, form 5.11. (2 entries required)
4. Copy of paid funeral bill.

IF YOU HAVE A WILL THE ABOVE APPLIES ALONG WITH THE FOLLOWING:

Probating will: Application to Probate Will, form 2.0
Waiver of Notice of Probate of will, form 2.1
Certificate of Service of Notice of Probate of Will, form 2.4
Notice of Probate of Will, form 2.2

Not Probating will: Steps 1 through 4 along with the original will and Entry
to file decedent's will without probate.

LOC. R. 57.10
(FORMS REQUIRED FOR FILING A TRANSFER OF MOTOR VEHICLE)

1. Application for Certificate of Transfer of Motor Vehicle, form 9.C.

LOC. R. 57.11
(FORMS REQUIRED FOR FILING A TRANSFER OF REAL ESTATE)

1. Application for Certificate of Transfer, form 12.0.
2. Certificate of Transfer, form 12.1. (2 entries required)

LOC. R. 57.12
(FORMS REQUIRED FOR FILING A GUARDIANSHIP, ALLEGED INCOMPETENT)

1. Application for Appointment of Guardian, form 17.0.
2. Next of Kin of Proposed Ward, form 15.0.
3. Waiver of Notice and Consent, form 15.1.
4. Statement of Expert Evaluation, form 17.1.
5. Fiduciary's Acceptance, form 15.2.
6. Guardians Bond, if needed, form 15.3.

7. Notice to Prospective Ward of Application & Hearing, form 17.3.
 8. Notice of Hearing for Appointment of Guardian of Alleged Incompetent, form 17.4.
 9. Oath of Guardian, form 15.9.
 10. JE Appointment of Guardian for Incompetent Person, form 17.5.
 11. Letters of Guardianship, form 15.4. (2 entries needed)
- **** If filing Emergency Guardianship Please see Loc. R. 66.03 ****

LOC R. 57.13
(FORMS REQUIRED FOR A MINOR GUARDIANSHIP)

1. Application for Appointment of Guardian of Minor, form 16.0.
2. Next of Kin, form 15.0.
3. Waiver of Notice & Consent, form 15.1.
4. Fiduciary's Acceptance, form 15.2.
5. Affidavit, form 16.1.
6. Selections of Guardian by Minor, form 16.2.
7. Notice of Hearing for Appointment of Guardian of Minor, form 16.3.
8. Notice of Hearing for Appointment of Guardian of Minor, form 16.4.
9. JE Appointment of Guardian of Minor, form 16.5.
10. Oath of Guardian, form 15.9.
11. Letters of Guardianship, form 15.4. (2 letters needed)

LOC. R. 57.14
(FORMS REQUIRED FOR A CHANGE OF NAME OF MINOR)

1. Application for Change of Name of Minor, form 21.2.
2. Affidavit in Support of Application for Change of Name of Minor, form 21.02.
3. Consent to Change of Name, form 21.4.
4. Judgment Entry Setting Hearing and Ordering Notice, form 21.03 (if necessary).
5. Notice of Hearing on Change of Name, form 21.5 (if necessary).
6. Judgment Entry Changing Name of Minor, form 21.3.
7. Application to Waive Publication and Seal File, form 21.6A (if necessary).
8. Release For Criminal background Check, form 21.14.

Please refer to Local Rule 75.9 for other documentation required in addition to those documents listed above.

LOC. R. 57.15
(FORMS REQUIRED TO CONFORM LEGAL NAME OF MINOR)

1. Application to Conform Legal Name of Minor, form 21.9.
2. Affidavit in Support of Application to Conform Legal Name of Minor, form 21.09.
3. Consent to Name Conformity, form 21.13.
4. Judgment Entry Setting Hearing and Ordering Notice, form 21.11 (if necessary).
5. Notice of Hearing on Conforming Legal Name, form 21.12 (if necessary).
6. Judgment Entry Conforming Legal Name of Minor, form 21.10.
7. Release for Criminal Background Check, form 21.14.

8. Application to Waive Publication Requirement and Seal, form 21.6B (if necessary).

Please refer to Local Rule 75.9 for other documentation required in addition to those documents listed above.

LOC. R. 57.16

(FORMS REQUIRED FOR A CHANGE OF NAME OF ADULT)

1. Application for Change of Name of Adult, form 21.0
2. Affidavit in Support of Application for Change of Name of Adult, form 21.01.
3. Judgment Entry Setting Hearing and Ordering Notice, form 21.03 (if necessary).
4. Notice of Hearing on Change of Name, form 21.5 (if necessary).
5. Judgment Entry Changing Name of Adult, form 21.1.
6. Release For Criminal Background Check, form 21.14
7. Application to Waive Publication Requirement and Seal, form 21.6A (if necessary).

Please refer to Local Rule 75.9 for other documentation required in addition to those documents listed above.

LOC. R. 57.17

(FORMS REQUIRED TO CONFORM NAME OF ADULT)

1. Application to Conform Legal Name of Adult, form 21.7.
2. Affidavit in Support of Application to Conform Legal Name of Adult form 21.07.
3. Judgment Entry Setting Hearing and Ordering Notice, form 21.11.
4. Notice of Hearing on Conforming Legal Name, form 21.12 (if necessary).

5. Judgment Entry Conforming Legal Name of Adult, form 21.8.
6. Release For Criminal Background Check, form 21.14.
7. Application to Waive Publication Requirement and Seal, form 21.6B (if necessary).

Please refer to Local Rule 75.9 for other documentation required in addition to those documents listed above.

LOC. R. 57.18

(FORMS REQUIRED FOR AN APPLICATION FOR ORDER TO DISINTER REMAINS)

1. Application for Order to Disinter Remains, form 25.0.
2. Entry Setting Hearing on Application to Disinter Remains, form 25.1 (if necessary).
3. Notice of Hearing to Disinter Remains, form 25.2 (if necessary).
4. Affidavit of Notice of Hearing to Disinter Remains, form 25.3.
5. Surviving Spouse and Next of Kin Identification form
6. Entry Dispensing with Setting of Hearing, (if necessary).
7. Waiver of Notice of Hearing to Disinter Remains.
8. Order to Disinter Remains, form 25.6.
9. Copy Decedent's Birth Certificate.
10. Copy of Death Certificate.

LOC. R. 57.19

(FILINGS & JUDGMENT ENTRIES)

Any other forms deemed necessary by the Probate Court.

**LOC. R. 57.20
(CASE NUMER)**

All filings, including attachments, must have the case number on each page.

SUP. R. 58 DEPOSIT FOR COURT COSTS

- (A) Deposits in the amount set forth in a local rule shall be required upon the filing of any action or proceeding and additional deposits may be required.
- (B) The deposit may be applied as filings occur.

**LOC. R. 58.1
(DEPOSIT FOR COURT COSTS)**

Deposits in the amount set forth in Appendix A shall be required upon the filing of all actions and proceedings listed therein. Otherwise, the filings will not be accepted by the Court. The balance of any Court costs shall be paid when the final account or any partial account is filed. At the conclusion of a case, if the remaining cost deposit balance for any depositor, is ten dollars (\$10.00) or less, it shall be transferred to the Seneca County Indigent Guardian Fund.

**LOC. R. 58.2
(DEPOSIT FOR COURT COSTS)**

Court costs as set forth in the Schedule of Court Costs contained herein as Appendix A-1 shall be charged and collected, and shall be in full for all services rendered in the respective proceedings. Appendix is subject to modification by the Court and that all parties should verify they have the most recent schedule before filing.

**LOC R. 58.3
(DEPOSIT FOR COURT COSTS)**

The Court will accept payment for costs and fees via credit cards. Any fees associated with payment by credit cards will be the credit card holder's responsibility and will be added to the total amount due.

LOC R. 58.4
(DEPOSIT FOR COURT COSTS)

The Seneca County Probate Court will charge a minimum of \$10.00 for any payment that is returned as non-sufficient funds (NSF). This includes checks and all forms of electronic payments.

SUP. R. 59 WILLS

- (A) Before an application is made to admit the will to probate, to appoint an estate fiduciary, or to relieve an estate from administration, each applicant or the applicant's attorney shall examine the index of wills deposited pursuant to section 2107.07 of the Revised Code. Wills deposited pursuant to section 2107.07 of the Revised Code previous to the will offered for probate shall be filed in the estate proceedings for record purposes only.
- (B) Fiduciaries appointed to administer testate estates shall file a Certificate of Service of Notice of Probate of Will (Standard Probate Form 2.4) within one hundred twenty days of their appointment or be subject to removal proceedings. If required by the Court, proof of service shall consist of either waivers of notice of the probate of the will or original certified mail return receipt cards as provided under Civil Rule 73(E)(3). A waiver of notice may not be signed by any minor, or on behalf of a minor sixteen or seventeen years of age. See Civil Rule 4.2.

LOC. R. 59.1
(WILL FOR DEPOSIT)

Any will that is being deposited with the Court for safekeeping pursuant to R.C. 2107.08 shall be accompanied by a Certificate of Deposit of Will form. The cost to deposit will for safekeeping is \$25.00.

LOC. R. 59.2
(DESIGNATION OF ANCIENT WILLS)

In May of each year, the Court shall review all Wills which have been on deposit with the Court for more than 100 years. These Wills shall be designated "Ancient Wills" opened by the Court, and a notice shall be run in a newspaper of general circulation in Seneca County, listing Ancient Wills that have not been claimed. If the Testator is living, the Will may be released to the

Testator, or by request, the Will may remain on deposit with the Court. Thirty days after the notice, any Ancient Wills that are not claimed, or all Ancient Wills which the Court receives no direction or request from any interested party, shall be filed with the Court and the original and copies of the Ancient Wills shall be disposed of in a manner prescribed by the judge. The Court shall retain an electronic copy of the Will prior to its disposal.

LOC. R. 59.3
(PROBATING A LOST, SPOLIATED OR DESTROYED WILL)

This Rule covers the process to admit a lost, spoliated or destroyed will to probate under ORC §2107.26 and §2107.27.

A. Procedure

An application to admit a lost, spoliated or destroyed will to Probate must be accompanied by all other prescribed forms necessary to begin the administration of a testate estate, along with the Application to Probate Lost Spoliated or Destroyed Will, and a Judgement Entry Setting Hearing (Appendix L).

B. Notice and Hearing

The applicant seeking to admit a lost, spoliated or destroyed will to Probate is responsible for serving the notice required in ORC 2107.27(A). The applicant must file the Verification of Service (Appendix M) with the Court no later than five (5) calendar days before the hearing. The witnesses to the purported will are required to attend the hearing to give testimony, as are the Applicant and the Applicant's Attorney.

SUP. R. 60 APPLICATION FOR LETTERS
OF AUTHORITY TO ADMINISTER ESTATE
AND NOTICE OF APPOINTMENT

- (A) Notice of an application for appointment of administrator shall be served at least seven days prior to the date set for hearing. If there is no known surviving spouse or next of kin resident of the state, the notice shall be served upon persons designated by the Court.
- (B) The administrator shall give notice of the appointment within seven days after the appointment to all persons entitled to inherit, including persons entitled to an allowance for support, unless those persons have been provided notice of the hearing on the appointment or have waived notice.
- (C) The probate court shall serve by certified mail the spousal citation and summary of rights required by R.C. 2106.02 to the surviving spouse within 7 days of the initial appointment of the administrator or executor, unless a different time is established

by local rule or unless the 8.6, Waiver of Service to Surviving Spouse of the Citation to Elect is filed.

SUP. R. 61 APPRAISERS

- (A) Without special application to the Court, a fiduciary may allow to the appraiser as compensation for services a reasonable amount agreed upon between the fiduciary and the appraiser, provided the compensation does not exceed the amount allowed by local Court rule. If no local Court rule exists, the compensation shall be subject to Court approval.
- (B) If, by reason of the special and unusual character of the property to be appraised, the fiduciary is of the opinion that the appraisal requires the services of persons qualified in the evaluation of that property, a qualified appraiser may be appointed and allowed compensation as provided in division (A) of this rule.

LOC. R. 61.1 (APPRAISERS)

The following persons shall be approved by the Court as qualified appraisers of real Estate when they submit to the court their State of Ohio Real Estate License or their Membership to the National or State of Ohio Appraisers Association. Persons asking to be put on the Court's appraisers list need to submit the areas they are qualified in appraising.

EXAMPLE

A. REAL PROPERTY

- 1. Farms**
- 2. Commercial**
- 3. Homes**
- 4. Industrial**

B. Personal Property

- 1. Jewelry**
- 2. Antiques**
- 3. Household Furnishings**
- 4. Stocks and Bonds**
- 5. Tools**
 - a. Mechanics**
 - b. Farm Tools**
 - c. Shop**

- 6. Coins**
- 7. Stamps**
- 8. Art Work**
- 9. Corporate Assets**
- 10. Livestock**
- 11. Vehicles**

The Court will maintain an alphabetical list of all such approved persons, available to the general public in the selection of real estate appraisers for filings in this Court. The Court may from time to time add to and delete from this list in its discretion based on the above qualifications.

When it is necessary to determine the value of property other than realty, including but not limited to coins, stamps, books, art, there shall be submitted to the Court an independent application for an appraiser in that particular field along with a statement of his/her qualifications in such specialty. The Court's approval of the application shall be based upon the information admitted in each case. In lieu of the appointment of an appraiser for real property, the executor or administrator may accept the valuation of the real property by the county auditor.

SUP. R. 62 CLAIMS AGAINST ESTATE

- (A) When a claim has been filed with the Court pursuant to section 2117.06 of the Revised Code, the fiduciary shall file a copy of any rejection of claim with the Court.
- (B) If the Court requires a hearing on claims or the fiduciary requests a hearing on claims or insolvency, the fiduciary shall file a schedule of all claims against the estate with the Court. The schedule of claims shall be filed with the fiduciary's application for hearing or within ten days after the Court notifies the fiduciary of a Court-initiated hearing.

LOC. R. 62.1 (CLAIMS AGAINST ESTATE)

All creditors having claims against the estate shall present their claims in either of the following ways: (a) in writing to the executor or administrator, or (b) in writing to the executor or administrator with a copy being sent to the Probate Court.

SUP. R. 63 APPLICATION TO SELL PERSONALTY

An application to sell personal property shall include an adequate description of the property. Except for good cause shown, an order of sale shall not be granted prior to the filing of the inventory.

LOC. R. 63.1 (APPLICATION TO SELL PERSONALTY)

Before the Probate Court confirms a sale made under an order of private sale, the fiduciary shall file a statement indicating that the private sale was made after diligent endeavor to obtain the best price for the property and that the private sale was at the highest price he could get for the property.

SUP. R. 64 ACCOUNTS

- (A) The vouchers or other proofs required by Section 2109.302 and 2109.303 of the Revised Code and receipts filed or exhibited pursuant to section 2109.32(B)(1)(b) of the Revised Code, shall be referenced to the account number, letter, or date.
- (B) If land has been sold during the accounting period, the account shall show the gross amount of the proceeds and include a copy of the closing statement itemizing all of the disbursements.
- (C) Receipts for distributive shares signed by persons holding power of attorney may be accepted, provided the power of attorney is recorded in the county in which the estate is being administered and a copy of the recorded power is attached to the account.
- (D) Exhibiting assets.
 - (1) The Court may require that all assets be exhibited at the time of filing a partial account.
 - (2) Cash balances may be verified by exhibiting a financial institution statement, passbook, or a current letter from the financial institution in which the funds are deposited certifying the amount of funds on deposit to the credit of the fiduciary. Assets held in a safe deposit box of a fiduciary or

by a surety company on a fiduciary's bond may be exhibited by filing a current inventory of the assets. The inventory shall be certified by the manager of the safe deposit box department of the financial institution leasing the safe deposit box or by a qualified officer of the surety company if the assets are held by a surety. If the assets are held by a bank, trust company, brokerage firm, or other financial institution, exhibition may be made by proper certification as to the assets so held. For good cause shown, the Court may designate a deputy clerk of the Court to make an examination of the assets located in the County, not physically exhibited to the Court or may appoint a commissioner for that purpose if the assets are located outside the county. The commissioner appointed shall make a written report of findings to the Court.

- (E) A final or distributive account shall not be approved until all Court costs have been paid.

LOC. R. 64.1
(ACCOUNTS OF ADMINISTRATORS AND EXECUTORS)

- (A) Within six months of appointment, every administrator and executor shall render a final and distributive account of the administrator's or executor's administration of the estate, unless an application to extend has been filed and approved.
- (B) Every account shall include an itemized statement of all receipts of the administrator or executor during the accounting period and of all disbursements and distributions made by the executor or administrator during the accounting period. In addition, the account shall include an itemized statement of all funds, assets, and investments of the estate known to or in the possession of the administrator or executor at the end of the accounting period and shall show any changes in investments since the last previous account.
- (C) In estate of decedents in which the sole legatee, devisee, or heir is also the administrator or executor of the estate, no partial accountings are required, and the administrator or executor shall not file a final account or final and distributive account. In lieu of filing a final account, the administrator or executor of an estate of that type shall be discharged by filing with the Court within thirty days after completing the administration of the estate a certificate of termination of an estate that states all of the following:
 - 1. All debts and claims presented to the estate have been paid in full or settled finally.

2. That all estate tax returns, if any, have been filed and estate tax has been paid.
 3. All attorney's fees have been waived by or paid to counsel of record of the estate, and all executor or administrator fees have been waived or paid.
 4. The amount of attorney's fees and the amount of administrator or executor fees that have been paid.
 5. That all the remaining assets have been distributed to the sole legatee, devisee, or heir.
- (D) Not later than thirteen months after appointment, every administrator and executor shall render an account of the administrator's or executor's administration, unless a certificate of termination is filed.
- (E) Waivers are required by all residuary beneficiaries on a final account.
- (D) When a final account is presented for filing all receipts, waivers and/or notices must be filed. If a rejection of Claim or insolvency has not been filed with the Court prior to the filing of the final account, then a satisfaction or release of Claim against the Estate must be filed by Claimant with the Court before filing of the final account. If a satisfaction or release of Claim against the Estate cannot be obtained, then the Court will accept a copy of the cancelled check AND bank statement showing proof the Claim was paid for the exact amount. If not all filings listed above are provided to the Court, an extension of time needs to be filed. The Court will not accept final accountings without all necessary paperwork.
- (E) A final or distributive account shall not be approved until all Court costs have been paid.

LOC. R. 64.2
(ACCOUNTS OF GUARDIANS AND CONSERVATORS)

- (A) The first guardianship account is due one year after the appointment of the Guardian of the estate and all other accounts are due annually thereafter. If the guardianship is for the person only, no account is required.
- (B) The first conservatorship account is due one year after the appointment of the conservatorship and all other accounts are due annually thereafter.

- (C) Every account shall include an itemized statement of all receipts of the guardian or conservator during the accounting period and of all disbursements and distributions made by the guardian or conservator during the accounting period. The itemized disbursements and distributions shall be verified by vouchers or proof, except in the case of an account rendered by a corporate fiduciary subject to Section 1111.28 of the Revised Code. In addition, the account shall include an itemized statement of all funds, assets, and investments of the estate known to or in the possession of the guardian or conservator at the end of the accounting period and shall show any changes in investments since the last previous account.
- (D) When a guardian or conservator is authorized by law to distribute the assets of the estate, in whole or in part, the guardian or conservator may do so and include a report of the distribution in the guardian's or conservator's succeeding account.
- (E) The Court may waive, by order, an account required of a guardian of the estate or of a guardian of the person and estate, other than an account made pursuant to Court order, if any of the following circumstances apply:
 - 1. The assets of the estate consist entirely of real property.
 - 2. The assets of the estate consist entirely of personal property, that property is held by a bank, savings and loan association, or trust company in accordance with section 2109.13 of the Revised Code, and the Courts has authorized expenditures of not more than ten thousand dollars annually for the support, maintenance, or, if applicable, education of the ward.
 - 3. The assets of the estate consist entirely of real property and of personal property that is held by a bank, savings and loan association, or trust company in accordance with section 2109.13 of the Revised code, and the Court has authorized expenditures of not more than ten thousand dollars annually for the support, maintenance, or, if applicable, education of the ward.

LOC. R. 64.3
(ACCOUNTS OF TESTAMENTARY TRUSTEES AND OTHER FIDUCIARIES)

- (A) The first testamentary trusteeship account is due one year after the appointment of the trustee and all other accounts due annually thereafter.
- (B) The first account for other fiduciaries is due one year after the appointment and all other accounts due annually thereafter.
- (C) Every commissioner shall file a report of distribution within 6 months of

appointment.

- (D) Every account shall include an itemized statement of all receipts of the testamentary trustee or other fiduciary during the accounting period and of all disbursements and distributions made by the testamentary trustee or other fiduciary during the accounting period. The itemized disbursements and distributions shall be verified by vouchers or proof, except in the case of an account rendered by a corporate fiduciary subject to section 1111.28 of the Revised Code. In addition, the account shall include an itemized statement of all funds, assets, and investments of the estate or trust known to or in the possession of the testamentary trustee or other fiduciary at the end of the accounting period and shall show any changes in investments since the last previous account. The accounts of testamentary trustees shall, and the accounts of other fiduciaries may, show receipts and disbursements separately identified as to principal and income.
- (E) Every account shall be upon the signature of the testamentary trustee or other fiduciary. When two or more testamentary trustees or other fiduciaries render an account, the Court may allow the account upon the signature of one of them.
- (F) When a testamentary trustee or other fiduciary is authorized by law or by the instrument governing distribution to distribute the assets of the estate or trust, in whole or in part, the testamentary trustee or other fiduciary may do so and include a report of the distribution in the testamentary trustee's or fiduciary's succeeding account.

LOC. R. 64.4 **PHOTOCOPIES OF VOUCHERS WITH APPLICABLE ACCOUNTS**

In the event that vouchers are required for a particular account, and in the event that the financial institution does not return original vouchers to the account holder, photocopies of canceled checks are acceptable for filing with the Court in all applicable accountings on the condition that: (i) the photocopies are complete copies of the originals, (ii) the photocopies are clearly legible, and (iii) the front and back of said checks are photocopied.

LOC. R. 64.5 **(DOCUMENTATION RETURN)**

Pursuant to Rule 26.04 (D) (1) of the Ohio Rules of Superintendence, after the Court has reviewed and reconciled the vouchers or checks or other evidence filed in support of expenditures or distributions stated in an account, the vouchers, proof, or other

evidence filed in support of the expenditures or distributions stated in an account will be returned to the fiduciary.

**LOC. R. 64.6
(ATTORNEY FEES)**

An application and order must be submitted for any attorney fees taken on a partial account. Then computation of attorney fees (Appendix B herein) must be filed with the application.

**LOC. R. 64.7
(RECEIPT)**

A receipt for a distributive share executed on behalf of his/her principal by a person holding a valid power of attorney may be accepted if a copy of the valid power of attorney is attached to the account.

**LOC. R. 64.8
(BANK CERTIFICATES)**

Bank certificates must be filed with applicable partial accounts.

SUP. R. 65 LAND SALES - R.C. CHAPTER 2127

- (A) In all land sale proceedings, the plaintiff, prior to the issuance of an order finding the sale necessary, shall file with the Court evidence of title showing the record condition of the title to the premises described in the complaint and prepared by a title company licensed by the state of Ohio, an attorney's certificate, or other evidence of title satisfactory to the Court. Evidence of title shall be to a date subsequent to the date on which the complaint was filed.
- (B) The plaintiff shall give notice of the time and place of sale by regular mail at least three weeks prior to the date of a public sale to all defendants at their last known addresses. Prior to the public sale, the plaintiff shall file a certificate stating that the required notice was given to the defendants at their last known addresses. The plaintiff must also give notice of the time and place of a public sale by advertisement at least three weeks successively in a newspaper published in the county where the land is situated.
- (C) In all private land sale proceedings by civil action, the judgment entry confirming sale, ordering issuance of deed, and ordering distribution shall show the gross amount of the proceeds and include a copy of the proposed closing statement itemizing all of the proposed disbursements.

- (D) The Court may appoint a disinterested person, answerable to the Court, who shall investigate the circumstances surrounding the proposed transaction, view the property, ascertain whether the proposed sale is justified and report findings in writing. The report shall be a part of the record. The compensation for the person performing these services shall be fixed by the Court, according to the circumstances of each case and shall be taxed as costs.

**LOC. R. 65.1
(LAND SALES)**

All interested parties in a land sale proceeding shall be named as defendants in the complaint (including the Treasurer of Seneca County and the Treasurer of any other Ohio County if selling land outside of Seneca County) and no order of sale shall be issued by the Court unless the Rules of Civil Procedure have been complied with regarding service of process and answers by defendants.

**SUP. R. 66 GUARDIANSHIP
(SERIES NUMBERING, GUARDIANSHIPS)**

Due to the manner in which the Supreme Court of Ohio has numbered Sup. R. 66.01 through 66.09 by using 4 digits, all of this Court's local rules pertaining to Guardianships shall be similarly numbered.

- (A) All applications for the appointment of a guardian on the grounds of mental incompetency shall be accompanied by either a statement of a physician or clinical psychologist, or a statement that the prospective ward has refused to submit to an examination or that the agent of the prospective ward or other individual has refused to consent to an examination.
- (B) An Application for Authority to Expend Funds (Standard Probate Form 15.7) shall not be approved until an Inventory (Standard Probate Form 15.5) has been filed.
- (C) An application for allowance of care and support of a minor shall allege, if such is the fact, that the parents are financially unable to provide the items for which the amount is sought.

**SUP. R. 66.01
(DEFINITIONS)**

The terms defined in Sup. R. 66.01 have the same meaning when used in Loc. R. 66.

LOC. R. 66.02
(APPLICATION OF RULES)

The Local Rule 66 applies to all guardianships administered through this Court, unless otherwise indicated in the particular Local Rule, or unless expressly waived by Court Order.

LOC. R. 66.03

(A) Emergency Guardianships

Consistent with Rule of Superintendence Rule 66.03 (A). The following process is established for emergency guardianships in the Seneca County Probate Court.

The following forms shall be completed and filed with the Court. All forms can be accessed on the Court's website: www.senecajpcourt.com

<u>Form #</u>	<u>Name</u>
15.0	Next of Kin of Proposed Ward
15.1	Waiver of Notice and Consent
15.2	Fiduciary's Acceptance
15.4	Letters of Guardianship
17.0	Application for Appointment of Guardian of Alleged Incompetent
17.1A	Supplemental For Emergency Guardian of Person
17.1	Statement of Expert Evaluation
17.3	Notice to Prospective Ward of Application and Hearing Affidavit of Indigency

At the time of filing, each guardian is responsible to pay the background check fee as established by the Court regardless of indigency of the ward (See Loc. R. 66.05).

As provided by statute, the Court may appoint an emergency guardian for a maximum period of seventy-two (72) hours. For good cause shown, after hearing, the Court may extend an emergency guardianship for a specified period, but not to exceed an additional thirty (30) days.

(B) Guardian Comments & Complaints

Consistent with Rule 66.03 (B) of the Rules of Superintendence for the Courts of Ohio, the Seneca County Probate Court establishes the following process for submitting comments or complaints regarding the performance of guardians appointed by the Court, including actions of the guardian in denying a request of a person to visit with the ward, and for considering such comments and complaints.

- The Probate Court Investigator(s) are designated to accept and consider comments and complaints submitted to the Seneca County Probate Court concerning guardians.

- Comments or complaints may be submitted in writing to Probate Court, 103 E. Market St., Tiffin, Ohio, 44883 or via facsimile at (419) 447-1167.
- Upon receipt of a comment or complaint, the Court will provide a copy to the guardian who is the subject of the comment or complaint. A certificate of service will be filed in the case file showing that this step has taken place. Time permitting, the guardian may be given the opportunity to respond to the comment or complaint.
- The comment or complaint will then be forwarded to the probate court judge for prompt consideration and appropriate action, if any is necessary.
- The Court shall maintain a written record in the guardianship case file regarding the nature and disposition of the comment or complaint.
- The Court shall notify the person making the comment or complaint and the guardian of the disposition of the comment or complaint.

**LOC. R. 66.05
(RESPONSIBILITIES OF COURT ESTABLISHING GUARDIANSHIPS)**

(A) General Responsibilities

The probate division of a court of common please that establishes a guardianship shall do all of the following:

- (1) Conduct, or cause to be conducted, a criminal background check of all applicants for appointment as a guardian. If the applicant for appointment as a guardian is a licensed Ohio attorney, the court may accept a certificate of good standing with disciplinary information issued by the Supreme Court in place of a criminal background check.
- (2) Require each guardian appointed by the court to execute an affidavit affirming the applicant has no pending misdemeanor or felony charges, has not been convicted of or pleaded guilty to any misdemeanor or felony offense, and shall notify the court within seventy-two hours of any change to the information contained in the affidavit.
- (3) Determine what weight to give to any pending charges or convictions of misdemeanor or felony offenses as disclosed in the criminal background check or the affidavit.
- (4) Require each guardian appointed by the court to submit to the court information documenting compliance with the guardian qualifications pursuant to Sup. R. 66.06 or 66.07, as applicable.
- (5) Direct the court investigator to inquire into the visitation history and preferences of the prospective ward during service of notice and the initial guardianship investigation pursuant to R.C. 2111.041 or at any other time that the court directs.

The court investigator shall make a written report of the visitation recommendation to the court.

The Seneca County Indigent Guardianship Program and Advocacy & Protective Services, Inc. (“APSI”) are exempt from this requirement.

(B) Guardian with Ten or More Adult Wards

To assist the Court in meeting its supervisory responsibilities under Sup.R. 66.05(B) and in satisfaction of the responsibilities arising under Sup.R. 66.08(H), on or before January 31 of each year, a guardian with ten or more wards through the Probate Courts of Ohio shall submit a roster of his/her wards with this Court on a standard form adopted for that purpose by the Ohio Supreme Court. The roster shall include a listing of the guardian’s wards, the case number and the appointing Court. The guardian shall have a continuing duty to advise the court of any change in the ward(s) under his/her care or the guardian’s name, address, telephone number and electronic mail address within ten days of the change occurring.

A guardian with 10 or more wards shall include with the Guardian’s Report form, a statement indicating whether the guardian is aware of any circumstances that may disqualify the guardian from continuing to serve as a guardian.

A guardian with ten or more wards shall be required to submit to the court an annual fee schedule that differentiates guardianship services fees, as established pursuant to local rule, from legal or other direct services;

On or before March 1st of each year, the court shall review the roster of guardians to determine if the guardians are in compliance with the education requirements of Sup.R. 66.06 or 66.07, as applicable, and that the guardians are otherwise qualified to serve.

The Seneca County Indigent Guardianship Program and APSI are exempt from this requirement.

LOC. R. 66.06 (GUARDIAN PRE-APPOINTMENT EDUCATION)

(A) Guardian Fundamentals Training Requirement

A guardian holds a unique role with respect to the ward, and the guardian has an obligation to obtain an understanding of the fundamentals of that relationship. Formalized training is one means to gain that competency.

Every guardian or successor guardian appointed after July 1, 2022, regardless of consanguinity (a blood relationship) or affinity (kinship by marriage) to the ward, must meet the guardianship fundamentals training requirements under Sup.R. 66.06 by completing prior to appointment or within six months thereafter, a six-hour guardian fundamentals course provided by the Supreme

Court of Ohio, or with prior approval of that Court, another entity. The fundamentals course shall include, at a minimum, education on the following topics:

- (1) Establishing the guardianship;
- (2) The ongoing duties and responsibilities of a guardian;
- (3) Record keeping and reporting duties of a guardian;
- (4) Any other topic that concerns improving the quality of the life of a ward;
- (5) Abuse, neglect, and exploitation training in order to detect and report allegations to authorities.

Those failing to meet the requirement shall be subject to citation for being in contempt of court and subject to sanctions including, but not limited to imposition of a fine, denial of compensation, and removal. The guardian is responsible for providing to the Court in a timely manner documentation that establishes compliance with the guardian fundamentals training requirement.

(B) Exceptions

An individual who was actively serving as a guardian or successor guardian on July 1, 2022 is exempt from the six-hour fundamentals training course.

A guardian or successor guardian appointed for a ward to whom the guardian or successor guardian is related by consanguinity (a blood relationship) or affinity (kinship by marriage) who was actively serving as a guardian or successor guardian between June 1, 2015 and July 1, 2022 is exempt from the six-hour fundamentals training course.

The Seneca County Indigent Guardianship Program and APSI are exempt from the six-hour fundamentals training course.

For good cause, upon written motion, the Court may modify or waive the six-hour fundamentals training course.

LOC. R. 66.07 (GUARDIAN CONTINUING EDUCATION)

(A) Guardians Continuing Education

Every guardian or successor guardian appointed after July 1, 2022, regardless of consanguinity (a blood relationship) and/or affinity (kinship by marriage) to the ward, must annually attend the three-hour guardian continuing training provided by the Supreme Court of Ohio.

Those failing to meet the requirement shall be subject to citation for being in contempt of court and subject to sanctions including, but not limited to imposition of a fine, denial of compensation, and removal. The guardian is responsible for providing to the Court in a timely

manner documentation that establishes compliance with the guardian continuing education requirement.

(B) Exceptions

A guardian or successor guardian who was actively serving as a guardian or successor guardian on July 1, 2022 is exempt from the three-hour annual continuing training provided by the Supreme Court.

A guardian or successor guardian appointed for a ward to whom the guardian or successor guardian is related by consanguinity (a blood relationship) or affinity (kinship by marriage) who was actively serving as a guardian or successor guardian between June 1, 2015 and July 1, 2022 is exempt from the three-hour annual guardian continuing training provided by the Supreme Court.

The Seneca County Indigent Guardianship Program and APSI are exempt from the annual three-hour training course requirement.

For good cause, upon written motion, the Court may modify or waive the annual three-hour training course requirement.

LOC. R. 66.08

(GENERAL RESPONSIBILITIES OF THE GUARDIAN TO THE COURT)

(A) Orders, rules, and laws

A guardian shall obey all orders of this Court establishing the guardianship and shall perform duties in accordance with local rules and state and federal law governing guardianships.

(B) Pre-appointment meeting

Unless otherwise determined by this Court, an applicant-guardian shall meet with a proposed ward at least once prior to appearing before the court for a guardianship appointment. When possible, and at the discretion of the court, the applicant guardian should inquire of the proposed ward with what persons the ward desires written and in-person visits and determine if the contact is in the best interest of the ward. The applicant guardian shall provide this information to the court at the time of the hearing on the application.

(C) Reporting abuse, neglect, or exploitation

A guardian shall immediately report to this Court and, when applicable, to adult protective services, the long-term care ombudsman, or law enforcement any appropriate allegations of abuse, neglect, or exploitation of a ward.

(D) Limitation or termination of guardianship

A guardian shall seek to limit or terminate the guardianship authority and promptly notify this Court if any of the following occurs:

- (1) A ward's ability to make decisions and function independently has improved;
- (2) Less restrictive alternatives are available;
- (3) A guardianship is no longer in the best interest of a ward;
- (4) A ward has died.

(E) Change of residence

- (1) A guardian shall notify this Court of a ward's change of residence and the reason for the change. Except if impracticable, the guardian shall notify the court no later than ten days prior to the proposed change.
- (2) A ward's change of residence to a more restrictive setting in or outside of the county of the guardian's appointment shall be subject to the court's approval, unless a delay in authorizing the change of residence would affect the health and safety of the ward.

(F) Court approval of legal proceedings

A guardian shall seek approval from this Court before filing a suit for the ward.

(G) Annual plan

A guardian of a person or the estate shall file annually with the Probate Clerk a guardianship plan as an addendum to the guardian's report. The guardianship plan shall simply state the guardian's goals for meeting the ward's personal and/or financial needs going forward. The guardian shall provide the court with a list of any changes made to the visitation list provided to the court pursuant to division (B) of this rule.

(H) Ward's principal income

A guardian shall inform this Court and apply to close the guardianship of the estate if the principal income of the ward is from governmental entities, a payee for that income is identified, and no other significant assets or income exist.

(I) Limits on guardian's compensation

- (1) A guardian's compensation is subject to [Sup.R. 73](#).

(2) A guardian who is in receipt of fees other than through the guardianship of the estate shall report to this Court the source and entity which reviewed and authorized payment.

(3) A guardian shall not receive incentives or compensation from any direct service provider providing services to a ward.

(J) Conflict of interest

A guardian shall avoid actual or apparent conflicts of interest regarding a ward's personal or business affairs. A guardian shall report to this Court all actual or apparent conflicts of interest for review and determine as to whether a waiver of the conflict of interest is in the best interest of the ward.

(K) Filing of ward's legal papers

In addition to filing an inventory, if applicable, pursuant to [R.C. 2111.14\(A\)\(1\)](#) and within three months after the guardian's appointment, a guardian shall file with this Court a list of all of the ward's important legal papers, including but not limited to estate planning documents, advance directives, and powers of attorney, and the location of such legal papers, if known at the time of the filing.

(L) Inventory, Fund Release, Expenditures and Identification of Legal Documents

Within three months of appointment, a guardian of the estate shall file an inventory of the ward's assets and income. Funds in the name of the ward shall not be released to the guardian without the approval of an Application to Release Funds (Form 15.6) or other specific court order. The expenditure of funds by a guardian shall not be approved until a Guardian's Inventory (Form 15.5) has been filed and an Application to Expend Funds (Form 15.7) has been approved.

Within three months of appointment, the guardian shall file a list of all of the ward's known important legal papers, including but not limited to estate planning documents, advance directive and the location of such papers. If it becomes known to the guardian that such information has changed or the existence of other important legal papers becomes known, the guardian shall report that new information to the Court in writing within thirty days of discovery.

(M) Guardians Report and Statement of Expert Evaluation

The first Guardian's Report is due one year after the appointment of the guardian and due annually thereafter.

In all guardianships, based on incompetence, a Statement of Expert Evaluation prepared by a Licensed Physician, Licensed Clinical Psychologist, Licensed Social Worker or Developmental Disability Team shall be filed by the guardian one year after the appointment of the guardian. Subsequent statements of expert evaluation are due annually thereafter.

(1) Exception

A guardian may be excused from filing Statements of Expert Evaluation subsequent to the initial Statement of Expert Evaluation if the guardian files with the Court a Motion to Dispense with Subsequent Statements of Expert Evaluation and submits a proposed Order regarding same (Appendix J).

SUP. R. 66.09

(GENERAL RESPONSIBILITIES OF THE GUARDIAN TO THE WARD)

(A) Professionalism, character, and integrity

A guardian shall act in a manner above reproach, including but not limited to avoiding financial exploitation, sexual exploitation, and any other activity that is not in the best interest of the ward.

(B) Exercising due diligence

A guardian shall exercise due diligence in making decisions that are in the best interest of a ward, including but not limited to communicating with the ward and being fully informed about the implications of the decisions.

(C) Least restrictive alternative

Unless otherwise approved by this Court, a guardian shall make a choice or decision for a ward that best meets the needs of the ward while imposing the least limitations on the ward's rights, freedom, or ability to control the ward's environment. To determine the least restrictive alternative, a guardian may seek and consider an independent assessment of the ward's functional ability, health status, and care needs.

(D) Person-centered planning

A guardian shall advocate for services focused on a ward's wishes and needs to reach the ward's full potential. A guardian shall strive to balance a ward's maximum independence and self-reliance with the ward's best interest.

(E) Ward's support system

A guardian shall strive to foster and preserve positive relationships in the ward's life unless such relationships are substantially harmful to the ward. A guardian shall be prepared to explain the reasons a particular relationship is severed and not in the ward's best interest.

(F) Communication with ward

- (1) A guardian shall strive to know a ward's preferences and belief system by seeking information from the ward and the ward's family and friends. The guardian is encouraged to identify those persons with whom the ward desires to communicate and facilitate the communication the guardian believes is in the best interest of the ward.
- (2) A guardian shall do all of the following:
 - (a) Meet with the ward as needed, but not less than once quarterly or as determined by this Court;
 - (b) Communicate privately with the ward;
 - (c) Assess the ward's physical and mental conditions and limitations;
 - (d) Assess the appropriateness of the ward's current living arrangements;
 - (e) Assess the need for additional services;
 - (f) Notify the Court if the ward's level of care is not being met;
 - (g) Document all complaints made by a ward and assess the need to report the complaints to the court of common pleas;
 - (h) Encourage visitation and communication with the ward so long as such visitation and communication is in the best interest of the ward;
 - (i) Promptly submit a list of names to the court of any persons or entities whom the guardian has excluded or seeks to exclude from visiting or communicating with the ward.

(G) Direct services

Except as provided in [Sup.R. 66.04\(D\)](#), a guardian shall not provide any direct services to a ward, unless otherwise approved by the Court.

(H) Monitor and coordinate services and benefits

A guardian shall monitor and coordinate all services and benefits provided to a ward, including doing all of the following as necessary to perform those duties:

- (1) Having regular contact with all service providers;
- (2) Assessing services to determine they are appropriate and continue to be in the ward's best interest;
- (3) Maintaining eligibility for all benefits;

- (4) Where the guardian of the person and guardian of the estate are different individuals, consulting regularly with each other.

(I) Extraordinary medical issues

- (1) A guardian shall seek ethical, legal, and medical advice, as appropriate, to facilitate decisions involving extraordinary medical issues.
- (2) A guardian shall strive to honor the ward's preferences and belief system concerning extraordinary medical issues.

(J) End of life decisions

A guardian shall make every effort to be informed about the ward's preferences and belief system in making end of life decisions on behalf of the ward.

(K) Caseload

A guardian shall appropriately manage the guardian's caseload to ensure the guardian is adequately supporting and providing for the best interest of the wards in the guardian's care.

(L) Duty of confidentiality

A guardian shall keep the ward's personal and financial information confidential, except when disclosure is in the best interest of the ward or upon order of this Court.

**LOC. R. 66.10
(POWERS OF ATTORNEY BY GUARDIAN PROHIBITED)**

The Court, through this Local Rule, exercises its discretion under R.C. 2111.50(A)(2)(c) and hereby prohibits a guardian appointed by the Court from executing a power of attorney or any other document which purports to appoint an agent to execute any of the duties or responsibilities imposed upon the guardian by law, rule, or order of the Court, unless otherwise approved by a specific order of the Court.

**LOC. R. 66.16
(GUARDIANSHIP TERMINATION)**

A termination of guardianship shall require written notice to the Court.

**LOC. R. 66.17
(INDIGENT WARDS)**

The applicant or the guardian must file with the Court an Affidavit of Indigency, if the waiver of court costs is being requested or payment of compensation from the Indigent Guardianship Fund is being requested. False affidavits are punishable by findings of contempt, prosecution, or other sanctions.

**LOC. R. 66.18
(ADDITIONAL COST DEPOSIT)**

Pursuant to RC 2111.031 and in addition to the basic cost deposit, the Court may require an Applicant for a guardianship to make an advance cost deposit in an amount the Court determines necessary (a) to defray the anticipated costs of examinations of an alleged incompetent, and (b) to cover the fees and costs to be incurred to assist the Court in deciding whether a guardianship is necessary.

**SUP. R. 67 ESTATES OF MINORS OF
NOT MORE THAN TEN THOUSAND DOLLARS**

- (A) Each application relating to a minor shall be submitted by the parent or parents or by the person having custody of the minor and shall be captioned in the name of the minor.
- (B) Each application shall indicate the amount of money or property to which the minor is entitled and to whom such money or property shall be paid or delivered. Unless the Court otherwise orders, if no guardian has been appointed for either the receipt of an estate of a minor or the receipt of a settlement for injury to a minor, the attorney representing the interests of the minor shall prepare an entry that orders all of the following:
 - (1) The deposit of the funds in a financial institution in the name of the minor;
 - (2) Impounding the principal and interest;
 - (3) Releasing the funds only upon an order of the Court or to the minor at the age of majority.
- (C) The entry shall be presented at the time the entry dispensing with appointment of a guardian or approving settlement is approved. The attorney shall be

responsible for depositing the funds and for providing the financial institution with a copy of the entry. The attorney shall obtain a Verification of Receipt and Deposit (Standard Probate Form 22.3) from the financial institution and file the form with the Court within seven days from the issuance of the entry.

LOC. R. 67.1
(ESTATES OF MINORS NOT MORE THAN TWENTY FIVE-THOUSAND)

Unless objection is received, the case will automatically close once the court receives the verification of deposit and receipt. This case can be reopened if necessary. Once the child reaches the age of 18 the money will be distributed to the minor.

SUP. R. 68 SETTLEMENT OF INJURY CLAIMS OF MINORS

- (A) An application for settlement of a minor's claim shall be brought by the guardian of the estate. If there is no guardian appointed and the Court dispenses with the need for a guardian, the application shall be brought by the parents of the child or the parent or other individual having custody of the child. The noncustodial parent or parents shall be entitled to seven day's notice of the application to settle the minor's claim which notice may be waived. The application shall be captioned in the name of the minor.
- (B) The application shall be accompanied by a current statement of an examining physician in respect to the injuries sustained, the extent of recovery, and the permanency of any injuries. The application shall state what additional consideration, if any, is being paid to persons other than the minor as a result of the incident causing the injury to the minor. The application shall state what arrangement, if any, has been made with respect to counsel fees. Counsel fees shall be subject to approval by the Court.
- (C) The injured minor and the applicant shall be present at the hearing.

LOC. R. 68.1
(GENERAL)

- (A) The presence of the minor and his or her parents is required for the hearing on the application for approval. Attendance may be waived only upon proper written motion for good cause shown.
- (B) A formal record shall be made of all hearings.

- (C) All settlement agreements shall be filed with the Court before a hearing date is set. This rule will be waived only in the most extraordinary circumstances.
- (D) In structured settlements the settlement agreement shall contain all the requirements of Sup. R. 68 or any other document that the court may require.
- (E) The application must be filed with the Court before a hearing date is set.
- (F) The party requesting the hearing date is to serve notice to all interested parties, Including the minor and the minor's parents, of said hearing date.

**SUP. R. 69 SETTLEMENT OF
CLAIMS OF OR AGAINST ADULT WARDS**

- (A) An application for settlement of a claim in favor of or against an adult ward shall be brought by the guardian of the estate. Notice of the hearing on the application shall be given to all persons who are interested parties to the proposed settlement, as determined by the Court. The Court may authorize or direct the guardian of the ward's estate to compromise and settle claims as the Court considers to be in the best interest of the ward. The Court may dispense with notice of hearing.
- (B) The application for settlement of an injury claim shall be accompanied by a current statement of an examining physician describing the injuries sustained, the extent of recovery from those injuries, and permanency of any injuries. The application shall state what additional consideration, if any, is being paid to persons other than the ward as a result of the incident causing the injury to the ward. The application shall state what arrangement, if any, has been made with respect to counsel fees. Counsel fees shall be subject to approval by the Court.

**LOC. R. 69.1
(SETTLEMENT OF CLAIMS OF OR AGAINST ADULT WARDS)**

- (A) The presence of the ward and guardian is required for the hearing on the application for approval. Attendance may be waived only upon proper written motion for good cause shown.
- (B) A formal record shall be made of all hearings.
- (C) All settlement agreements shall be filed with the Court before a hearing date is set. This rule will be waived only in the most extraordinary circumstances.

- (D) In structured settlements the settlement agreement shall contain all the requirements of Sup. R. 69 or any other document that the court may require.
- (E) The application must be filed with the Court before hearing date is set.
- (F) The party requesting the hearing date is to give notice to all interested parties, including the ward and guardian, of said hearing date.

**SUP. R. 70 SETTLEMENT OF WRONGFUL
DEATH AND SURVIVAL CLAIMS**

- (A) An application to approve settlement and Distribution of Wrongful Death and Survival Claims (Standard Probate Form 14.0) shall contain a statement of facts, including the amount to be allocated to the settlement of the claim and the amount, if any, to be allocated to the settlement of the survival claim. The application shall include the proposed distribution of the net proceeds allocated to the wrongful death claim.
- (B) The fiduciary shall give written notice of the hearing and a copy of the application to all interested persons who have not waived notice of the hearing. Notwithstanding the waivers and consents of the interested persons, the Court shall retain jurisdiction over the settlement, allocation, and distribution of the claims.
- (C) The application shall state what arrangements, if any, have been made with respect to counsel fees. Counsel fees shall be subject to approval by the Court.

**LOC. R. 70.1
(WRONGFUL DEATH AND SURVIVAL CLAIMS)**

An initial hearing is required for an Application to Approve Settlement and Distribution of Wrongful Death and Survival Claims. The Attorney representing the Fiduciary and the Fiduciary are required to attend the hearing. A hearing on subsequent Applications to Approve Settlement and Distribution of Wrongful Death and Survival Claims may be waived by the Court upon written motion by the Applicant.

**LOC. R. 70.2
(COURT COSTS)**

The initial deposit for court costs for an Application to Approve Settlement and Distribution of Wrongful Death and Survival Claims is required at the time of filing. Estates receiving ongoing partial settlements shall be exempted from further deposits of court costs when filing a Partial Application to Approve Settlement and Distribution of Wrongful Death and Survival Claims, if the amount of the settlement or judgment is \$2,000.00 or under.

SUP. R. 71 COUNSEL FEES

- (A) Attorney fees in all matters shall be governed by the Rules of Professional Responsibility. (Now 1.5, former DR2-106)
- (B) Attorney fees for the administration of estates shall not be paid until the final account is prepared for filing unless otherwise approved by the Court upon application and for good cause shown.
- (C) Attorney fees may be allowed if there is a written application that sets forth the amount requested and will be awarded only after proper hearing, unless otherwise modified by local rule.
- (D) The Court may set a hearing on any application for allowance of attorney fees regardless of the fact that the required consents of the beneficiaries have been given.
- (E) Except for good cause shown, attorney fees shall not be allowed to attorneys representing fiduciaries who are delinquent in filing the accounts required by section 2109.30 of the Revised Code.
- (F) If a hearing is scheduled on an application for the allowance of attorney fees, notice shall be given to all parties affected by the payment of fees, unless otherwise ordered by the Court.
- (G) An application shall be filed for the allowance of counsel fees for services rendered to a guardian, trustee, or other fiduciary. The application may be filed by the fiduciary or attorney. The application shall set forth a statement of the services rendered and the amount claimed in conformity with division (A) of this rule.
- (H) There shall be no minimum or maximum fees that automatically will be approved by the Court.

- (I) Prior to a fiduciary entering into a contingent fee contract with an attorney for services, an application for authority to enter into the fee contract shall be filed with the Court, unless otherwise ordered by Local Court Rule. The contingent fee on the amount obtained shall be subject to approval by the Court.

**LOC. R. 71.1
(CONTINGENT ATTORNEY FEES)**

When representation is on a contingent fee basis, counsel will be allowed fees on the amount obtained in the settlement, subject to the approval of Court.

**LOC. R. 71.2
(PARTIAL ATTORNEY FEES)**

Upon written motion the Court may approve payment of partial attorney fees for the administration of estates before the final account is prepared for filing. The motion for payment must be substantiated with either an hourly rate charge multiplied by the number of hours or a calculation of the percentage of the estate that has been completed multiplied by the total fee permitted by the suggested schedule in Appendix B-1. See Appendix B for the form for computation of attorney fees. However, the payment of fees to attorneys representing fiduciaries who are delinquent in filing any account required by R.C. 2109.30 will not be allowed.

**LOC. R. 71.3
(HEARINGS)**

Hearing will be held only if Court deems necessary.

**LOC. R. 71.4
(FEE SCHEDULE)**

Counsel fees for the administration of a decedent's estate as set forth in Appendix B-1 may serve as a guide in determining fees to be charged to the estate for legal services of an ordinary nature rendered as attorney for the executor or administrator in the complete administration of a decedent's estate. Filing of an application for authority to enter into a contingent fee contract is not required if the percentages are equal to or less than those set forth in Appendix B-1. SUCH SCHEDULES, HOWEVER, ARE NOT TO BE CONSIDERED AS SCHEDULES OF MINIMUM OR MAXIMUM FEES TO BE CHARGED, NOR WILL THEY BE AUTOMATICALLY APPROVED.

**LOC. R. 71.5
(EXTRAORDINARY FEES)**

Examples of extraordinary services which may be compensated in addition to the foregoing are suggested in Appendix B-2 attached hereto. All applications for extraordinary attorney fees MUST be filed prior to the filing of the final account for the Court's approval. All applications for extraordinary attorney fees must include the computation of attorney fees and consents signed by residuary beneficiaries. The Court may set a hearing on any application for extraordinary attorney fees regardless of the fact that the required consents of the beneficiaries have been given. If consents are not filed with the application for extraordinary fees, the court will set the matter for hearing. See Appendix B attached hereto.

**LOC. R. 71.6
(COMBINED TOTAL FEE LIMIT)**

When an attorney is appointed as executor, administrator, or guardian, and that attorney or other attorney with the same law firm is acting as attorney for the fiduciary, the combined total fees allowed may not exceed the fiduciary fee permitted by these Local Rules plus one-half of the attorney fees permitted by these Local Rules (See Appendix C-2).

**LOC. R. 71.7
(INDIGENT FEES)**

Counsel fees on indigent cases shall follow the guidelines set by the Seneca County Commissioners by resolution effective January 1, 2025. \$75.00 an hour out of court time and \$75.00 an hour in court time.

**SUP. R. 72 EXECUTOR'S AND
ADMINISTRATOR'S COMMISSIONS**

- (A) Additional compensation for extraordinary services may be allowed upon an application setting forth an itemized statement of the services rendered and the amount of compensation requested. The Court may require the application to be set for hearing with notice given to interested persons in accordance with Civil Rule 73(E).
- (B) The Court may deny or reduce commissions if there is a delinquency in the filing

of an inventory or an account, or if, after hearing, the Court finds that the executor or administrator has not faithfully discharged the duties of the office.

- (C) The commissions of co-executors or co-administrators in the aggregate shall not exceed the commissions that would have been allowed to one executor or administrator acting alone, except where the instrument under which the co-executors serve provides otherwise.
- (D) Where counsel fees have been awarded for services to the estate that normally would have been performed by the executor or administrator, the executor or administrator commission, except for good cause shown, shall be reduced by the amount awarded to counsel for those services.

LOC. R. 72.1 (EXECUTOR'S & ADMINISTRATOR'S COMMISSIONS)

Unless otherwise provided by law or ordered by the Court, an executor or administrator may charge for his/her ordinary services on an annual basis an amount computed in accordance with the attached schedule, Appendix E-1, and computed on the attached form, Appendix E.

SUP. R. 73 GUARDIAN'S COMPENSATION

- (A) Guardian's compensation shall be set by these local rules.
- (B) Additional compensation for extraordinary services, reimbursement for expenses incurred and compensation of a guardian of a person only may be allowed upon an application setting forth an itemized statement of the services rendered and expenses incurred and the amount for which compensation is applied. The Court may require the application to be set for hearing with notice given to interested persons in accordance with Civil Rule 73(E).
- (C) The compensation of co-guardians in the aggregate shall not exceed the compensation that would have been allowed to one guardian acting alone.
- (D) The Court may deny or reduce compensation if there is a delinquency in the filing of an inventory or account, or after hearing, the Court finds the guardian has not faithfully discharged the duties of the office.

**LOC. R. 73.1
(FEE SCHEDULE)**

Unless otherwise provided by law or ordered by the Court, a guardian may charge for his ordinary services on an annual basis an amount computed in accordance with the attached schedule, Appendix C-1, and computed on the attached form, Appendix C.

**LOC. R. 73.2
(FEE COMPUTATION)**

Compensation computed on income will not be allowed on balances carried forward from one accounting period to another, nor will an investment of funds or the final distribution of unexpected balances to a ward at the close of a guardianship be considered as an expenditure.

**LOC. R. 73.3
(VALUATION FOR FEE COMPUTATION)**

Guardians for indigent wards not related by consanguinity (a blood relationship) or affinity (kinship by marriage) may be compensated as follows:

- (A) Establishment Compensation – Upon written application, after the initial appointment of the guardian, \$200.00.
- (B) Annual Compensation – Upon written application, \$200.00 per year.

For good cause, upon written motion, the Court may reduce or waive the indigent guardian compensation articulated in this local rule.

**SUP. R. 74 TRUSTEE'S
COMPENSATION**

- (A) Trustee's compensation shall be set by local rule.
- (B) Additional compensation for extraordinary services may be allowed upon an application setting forth an itemized statement of the services rendered and the amount of compensation requested. The Court may require that the application be set for hearing with notice given to interested parties in accordance with Civil Rule 73(E).

- (C) The compensation of co-trustees in the aggregate shall not exceed the compensation that would have been allowed to one trustee acting alone, except where the instrument under which the co-trustees are acting provides otherwise.
- (D) Except for good cause shown, neither compensation for a trustee nor fees to counsel representing the trustee shall be allowed while the trustee is delinquent in the filing of an account.
- (E) The Court may deny or reduce compensation if there is a delinquency in the filing of an inventory or account, or after hearing, the Court finds the trustee has not faithfully discharged the duties of the office.

**LOC. R. 74.1
(FEE SCHEDULE)**

Except where the instrument creating a trust makes provisions for compensation, a testamentary trustee may charge an annual fee for the ordinary services performed by the trustee in connection with the administration of each separate trust as established by Appendix D-1.

**LOC. R. 74.2
(VALUATION FOR COMPUTATION)**

For the purpose of computing trustee's compensation as herein provided, the fair market value of the principal of the trust property shall be determined by the trustee as of the date of the trustee's appointment and as of each anniversary thereafter. The compensation so determined may be charged during the ensuing year. The annual fair market value of the principal shall be adjusted from time to time to reflect additions and withdrawals from the principal of the trust estate, and the compensation for the remaining portion of the annual period shall be similarly adjusted to reflect such revised valuations.

**LOC. R. 74.3
(EXTRAORDINARY FEES)**

Additional compensation for extraordinary service may be allowed upon application. The Court may require that such application be set for hearing and notice thereof be given to interested parties in accordance with Civil Rule 4.1. Such notice shall contain a statement of the amount of such compensation applied for.

LOC. R. 74.4
(FILING OF SCHEDULE)

A separate schedule of the computation of trustee's compensation shall be filed conforming to the form in Appendix D and filed with the Court at the time of payment of said fee.

SUP. R. 75 LOCAL RULES

Local rules of the Court shall be numbered to correspond with the numbering of these rules and shall incorporate the number of the rule it is intended to supplement. For example, a local rule that supplements Sup. R. 61 shall be designated County Local Rule 61.1.

LOC. R. 75.1
(OHIO ESTATE TAX RETURNS)

- (A) The person preparing any Ohio Estate Tax Return shall calculate the percentage of distribution of the subdivisions share of tax on both Ohio Estate Tax Forms 2 and 5. Any incomplete estate tax filings may be returned to the preparer.
- (B) All estate tax filings must be accompanied by a copy of the decedent's will, if applicable.

LOC. R. 75.2
(OHIO RULES OF CIVIL PROCEDURE)

- (A) The Ohio Rules of Civil Procedure shall apply to any proceeding where notice, other than service of summons, is required by law or deemed necessary by the Court and the statute providing for such notice does not direct the manner of its service.
- (B) In case personal service of summons or notice is required upon non-residents of the county and if a fee is charged by the sheriff then a deposit is necessary.

LOC. R. 75.3
(JURY TRIAL REQUESTS)

All jury trial requests shall be in compliance with Civ. R. 38 and 39.

LOC R. 75.4
(JURY COST AND DEPOSIT)

- (A) The first party to make a jury demand in a civil action before this Court shall make a jury demand deposit of \$500.00 with the Clerk of this Court no later than 14 days before the date set for trial. If the first party demanding a jury fails to timely make a deposit, any other party may preserve the right to a jury trial by making the jury deposit no later than 10 days before the trial date. Failure to make the jury demand deposit within the time allowed shall constitute a final waiver of a jury trial unless the Court, for good cause shown permits a late-filed deposit.
- (B) In any civil case the Judge may order a different deadline to make a jury deposit; and may order the jury deposit amount higher than normal to accommodate a trial involving multiple parties, likely to require additional alternate jurors, anticipated to be unusually protracted, or for other reasons.
- (C) The cost of jurors for a case which settles the day of trial shall be assessed against one or more of the parties as ordered by the Court.

LOC. R. 75.5
(INVENTORY)

- (A) The statutory time for filing of an inventory shall be adhered to and citations may be issued when filings are late unless application for an extension of time for filing has been granted. Applications for an extension shall set forth the time needed and the accompanying judgment entry shall have a blank space for the Court to insert the number of days granted.
- (B) The Schedule of Assets shall contain the legal description and the parcel number.
- (C) Waivers need to be signed by all residuary beneficiaries and attorney of record.
- (D) If waivers are not signed, fill out form 6.3, Notice of Hearing. These notices will be sent by certified mail by the Court.
- (E) When an inventory is filed and real estate is listed, an appointment of appraiser must be filed, unless the auditor's valuation of the real estate is presented to the court in

lieu of an appraiser.

- (F) If all necessary forms for filing an Inventory is not complete, then an extension of time needs to be filed. The Court will not accept an Inventory unless all paperwork is provided. (Inventory 6.0, Schedule of Assets 6.1, Waiver of Notice 6.2 and/or Notice of Hearing 6.3).

**LOC. R. 75.6
(SUBSTITUTION OF COUNSEL)**

Substitution of counsel may be approved only upon submission of the following to the Court:

- (A) A certification from the attorney transferring the case stating:
- (1) New counsel has been retained and the name, address and telephone number of newly retained counsel;
 - (2) That the newly retained counsel or the client has received the transferring attorney's entire file on the case, or that the client or retained counsel has been given express written notice of where and when the entire file may be examined; and
 - (3) That a written notice containing all Court dates and deadlines has been given to the newly retained counsel or to the client who wishes to proceed *pro se*.
- (B) A proposed entry of substitution.
- (C) Counsel accepting the substitution shall, upon acceptance, file with the Court a notice of substitution of counsel.
- (D) Payment of all outstanding Court costs on the case.

**LOC. R. 75.7
(WITHDRAWAL OF COUNSEL)**

Withdrawal of counsel may be approved only upon submission of the following to the Court:

- (A) A certification from the attorney seeking to withdraw from the case stating:
- (1) The reason for the need to withdraw;

- (2) That the client has received the withdrawing attorney's entire file on the case, or that the client has been given express written notice of where and when the entire file may be examined;
 - (3) That a written notice containing all Court dates and deadlines has been given to the client; and
 - (4) That the attorney has given the client an explanation of the case and the consequences of this action; including notice to the client that if he/she fails to appear personally, or through counsel, at any scheduled event in the case, the Court may hold the client in contempt of Court.
- (B) A proposed entry.
- (C) Payment of all outstanding Court costs on the case.

LOC R. 75.8 CHANGE IN SOME RULES (ELECTRONIC AND FACSIMILE FILINGS)

A. Definition of Terms:

Acceptance Confirmation: An email notification that an eFiler receives when a document submitted via the Court's eFiling System has been accepted by the Clerk, file-stamped, and docketed in a particular case.

Accepted: An eFiled document has been reviewed by the Clerk, file-stamped, and docketed in a specific case.

Clerk Review: The inspection by a Clerk of an eFiled document for compliance with local Court rules, policies, and procedures that is made prior to acceptance of a document for docketing in a specific case.

Conformed Signature: A type of electronic signature that indicates a real signature is in place of the original. It is created by typing an "/s/" before the signer's name, such as "/s/ John Doe."

Docketing: The entry of a document or pleading into the Court's official record.

eFiling System: The online service provided by the Court for the electronic filing of certain eligible documents via the Internet.

Electronic Filing (eFiling): The electronic submission of documents to the Court via its eFiling System. Only Accepted submissions will become part of the Court's official record. This definition of electronic filing does not apply to documents received via facsimile or email.

Eligible Filings: The specific types of documents or pleadings accepted by the Court for docketing via its eFiling System, as identified on the Court's website.

Fax Filing: The electronic transmission of documents to the Court via facsimile.

Receipt Confirmation: An email notification that an eFiler receives when a document is received via the Court's eFiling System. **The Receipt Confirmation does NOT indicate**

that the filing has been Accepted, only that the Court has received it and that it will be subject to Clerk Review.

Registered User: A person who is registered with the Court's eFiling System and authorized to submit documents electronically to the Court.

B. Registered Users and Authorization:

1. An attorney who wishes to file electronically must first register with the Court's eFiling System. Registration shall be in accordance with the procedure established by the Court as outlined on the Court's website. Registered Users shall be responsible for the security, use, and confidentiality of their username and password. All documents shall be deemed to have been filed with the authorization of the Registered User to whom a username has been assigned, unless the Registered User demonstrates otherwise by clear and convincing evidence.
2. Pro Se parties may not register with the eFiling System and are required to file by traditional means, either in person or by mail.
3. The Court reserves the right to revoke any eFiling System registration credentials as it deems necessary and appropriate.

C. Eligible Filings:

Documents currently eligible for eFiling are listed on the Court's website. The list of Eligible Filings will be updated as they become available. New cases and filings that have an associated filing fee are not accepted for eFiling at this time.

D. Filing Date and Time of eFiled Documents:

Registered Users may submit documents via the eFiling system 24 hours a day, 7 days a week. Upon receipt, the Court's eFiling system shall issue a Receipt Confirmation that the submission has been received. **The date/time of a filing is not determined by the time of submission via the eFiling system but is always determined by the Court's manual time stamp after Clerk Review and Acceptance of the submitted document.**

E. Service:

A certificate of service shall be included when an eFiler electronically files a document requiring service in accordance with the Ohio Rules of Civil Procedure and/or the Seneca County Probate Court Local Rules. The certificate of service shall state the date and manner in which service was accomplished on each case participant. Electronic service through the Court's eFiling system is not available at this time.

F. Confidentiality and Private Information:

1. Documents submitted for eFiling shall not be considered a public record until accepted by the Clerk and shall remain confidential at all times thereafter if so entitled under rule or law.
2. It is, however, the eFiler's responsibility to redact Social Security or taxpayer-identification numbers and financial account numbers prior to eFiling any documents containing such information. The inclusion of personal identifiers and/or private information may be cause for rejection of the filing.

G. Document Format for eFilings:

1. All eFilings shall conform to the Ohio Rules of Civil Procedure and shall include a Cover Page which includes the following information:
 - A. Caption of the Case;
 - B. Case Number;
 - C. Assigned Judge and Magistrate;
 - D. Description of the document being filed;
 - E. Attorney name, address, Ohio Supreme Court Registration Number, telephone, email address, and fax number (if applicable);
 - F. Number of pages, including the cover page, being transmitted.
2. All eFiled documents shall conform to Sup. R. 57 with regard to form and font, etc.
3. All eFiled documents shall be submitted in PDF format.

H. Signatures:

1. Any eFiled document requiring a signature shall either contain the signature on the source document at the time of submission or shall be submitted with a conformed signature with the notation "/s/" followed by the name of the signing person where the signature appears in the signed source document.
2. Any signature, conformed or otherwise, on an eFiled document shall be considered to be authentic and shall be considered the signature of the individual it purports to represent.
3. Any document that is eFiled and contains an original signature must be retained in hard copy by the attorney who eFiled the document.
4. Any document that is eFiled and contains a conformed signature must have the original signed source document retained in hard copy by the attorney who eFiled the document.

5. A conformed signature pertains to eFiled documents only. Documents not being eFiled shall conform with Local Rule 57.1, 57.2 and 57.3.

I. Proposed Orders:

1. All proposed orders corresponding to an eFiled motion must be submitted separately as a “Proposed Order.” Proposed Orders shall be presented to the Judge or Magistrate for approval after the Acceptance of the eFiled motion.

J. Acceptance or Rejection of Filing:

1. After the Clerk’s review of a submitted filing (during the Court’s normal business hours), the eFiler will receive notification from the Clerk that the submission has been either Accepted or Rejected.
2. If the submitted filing is Accepted, it shall be time stamped manually and docketed by the Clerk at the time of Acceptance. **For purposes of any filing deadline imposed by these Rules, any applicable Ohio Rules, or Court Order, a pleading will be deemed filed on the date and time when the Clerk manually time stamps the document.** The eFiler must allow sufficient time for Clerk review and any necessary re-submission. eFiling does NOT alter or extend applicable time limits!
3. If an eFiled document is not received because of a system error or failure, the Court may, upon satisfactory proof, enter an order permitting the document to be filed nunc pro tunc to the date it was submitted and accepted.
4. The Clerk is authorized to reject a submitted filing if it fails to comply with any requirement of this or any other of the Court’s Local Rules, policies, procedures, or practices, or any other applicable Ohio Rule of Probate/Civil Procedure. If a submitted filing is rejected, the eFiler will receive an email notification indicating the reason for the rejection. eFilers may make changes to rejected filings and resubmit them. If a rejected filing was timely filed initially, it will still be considered timely if re-submitted and accepted within twenty-four hours of the time of the notice of rejection, excluding Saturdays, Sundays, and holidays. If the compliance issues are not timely resolved in accordance with this Rule, the submitted filing shall be rejected and the document shall NOT become part of the Court’s record.

K. eFiled Documents as Originals:

All eFiled documents shall be considered originals. Additional originals of the documents shall not be filed with the Court Clerk. The eFiler must maintain possession of the source document and make it available for inspection by the Court upon request.

L. Facsimile Filing:

Filing by facsimile is not permitted on any matter that involves a filing fee as set forth in Local Rule 58.1 or Appendix A. Permitted pleadings and other papers may be filed with the Clerk of Courts by facsimile transmission [fax] to 419-447-1167, subject to the following conditions:

1. All filings, documents, and reports concerning mental illness, adoptions, or any document that may contain information covered by the Health Insurance Portability Accountability Act, including but not limited to Investigator Reports and Expert Evaluations, are not permitted to be filed via facsimile.
2. Documents required to be certified and/or notarized, or documents intending to initiate a case, such as but not limited to a complaint, application to probate will and accompanying documents, application for relief from administration, application to change name, marriage license application, application to appoint guardian, application for emergency guardianship, application for minor settlement, application for removal of fiduciary, or any other document the Clerk of Court deems inappropriate for facsimile filing are not permitted to be filed via facsimile.
3. A document filed by facsimile shall be accepted as the effective original filing. The person making the filing need not file any source document with the Probate Court but must maintain in his or her records and have available for production upon request by the Court the source document filed by facsimile, with original signatures as otherwise required and under applicable rules, together with the source copy of the facsimile cover sheet used for the subject filing.
4. The source document filed by facsimile shall be maintained by the person making the filing until the case is formally closed by the Court and all opportunities for post judgment relief are exhausted. The person making the filing shall also maintain the verification receipt that the transmission was completed without problems.
5. The person filing a document by facsimile shall also provide therewith a cover page containing the following information:
 1. The name of the Court;
 2. The caption of the case;
 3. The case number;
 4. The assigned Judge/Magistrate;
 5. The title of the document being filed;
 6. The date of transmission;
 7. The transmitting fax number;
 8. An indication of the number of pages in transmission including the cover page;

9. The name, address, telephone number, fax number, Supreme Court Registration Number, if applicable, and the e-mail address of the person filing the document, if available.
6. The Clerk's Office is not required to send any form of notice to the sending party of a failed facsimile filing. However, if practicable, the Clerk or Deputy Clerk may inform the sending party of a failed facsimile filing. The burden of confirming receipt of facsimile is on the sending party.
7. Subject to the provisions of these rules, all documents sent by facsimile and accepted by the Probate Court Clerk or Deputy Clerk shall be considered filed with the Probate Court Clerk's Office as of the date and time the Clerk or Deputy Clerk time-stamps the document received, as opposed to the date and time of the facsimile transmission. The office of the Probate Court will be deemed open to receive facsimile transmission of documents on the same days and time the Probate Court is regularly open for business as set forth in Rule 53.1. The risks of transmitting a document by facsimile to the Clerk's Office shall be borne entirely by the sending party. Anyone using facsimile filing is urged to verify receipt of such filing by the Clerk.

WARNING:

Pursuant to Ohio Rule of Civil Procedure 5(E), pleadings, motions, applications, and other filings may be filed with the Court by electronic transmission subject to conditions in the Rule. Local Rule 75.8 is adopted for the convenience of those filing documents with the Court, but the Court does not assume any new or additional responsibilities, obligations, or liabilities by virtue of this Rule.

The filer remains responsible for all requirements pertaining to time, costs, or otherwise when using this method of filing.

Technical Failures: All filers are responsible for any delay, disruption, interruption of electronic signals, and readability of the document and accept the full risk that the document may not be properly filed with the Court as a result.

This Local Rule pertains only to the method of filing and does not change any other requirement in the Local Rules, the Ohio Rules of Civil Procedure, or applicable Ohio Statutes, such as the requirement to obtain the consent of parties or counsel or the signatures/authorization to sign for opposing counsel.

LOC. R. 75.9
(NAME CHANGE AND NAME CONFORMITY PROCEEDINGS)

Name Change and Name Conformity Proceedings

This Rule governs name change and name conformity proceedings under R.C. Chapter 2717.

A. Choosing the Correct Proceeding

A name change proceeding, a name conformity proceeding and a birth record correction proceeding serve different purposes. Each action has its own requirements. The Court will determine if the application is the appropriate procedure to accomplish the person's intent based on the circumstances.

A name change proceeding seeks to change all or part of a person's name to a different name going forward.

A name conformity proceeding is solely to correct misspellings, inconsistencies or errors on one or more official identity documents evidencing a person's current legal name. A name conformity corrects errors that occurred in the past. It does not change a person's name, but merely identifies conflicting problems in the person's official identity documents and corrects those problems by a Court Order so that all of the person's official identity documents are consistent and conformed to prove the applicant's chain of identity and reflect the legal name the person currently uses.

A birth record correction proceeding only corrects clerical errors in the birth record of a person who was born in Ohio. A birth record correction proceeding may not be substituted for a name change proceeding or name conformity proceeding.

B. Documentation Requirements on Name Change Proceedings

An applicant seeking a name change must submit the required application and accompanying forms as described in Local Rule 57.14 or Local Rule 57.15, as applicable.

In support of the required forms, the applicant must provide photocopies of the following documents relating to the applicant or minor:

- Birth Certificate
- Social Security Card
- Driver's License or State issued ID Card (if any)

Upon review of the application and supporting documentation, the Court may order the submission of other documents the Court deems relevant to the application.

The applicant must redact (black out) social security numbers, driver's license numbers, and driver's license issuance and expiration dates on all documents submitted to protect the privacy and confidential information of the applicant or minor.

C. Documentation Requirements on Name Conformity Proceedings

An applicant seeking to conform a legal name must submit the required application and accompanying forms as described in Local Rule 57.14 or Local Rule 57.16, as applicable.

In support of the required forms the applicant must provide photocopies of all official identity documents relating to the applicant or minor with the application, including:

- Birth Certificate
- Social Security Card
- Driver's License or State issued ID Card (if any)
- Marriage Record (if any)
- Divorce Decree (if any)
- Passport (if any)
- All other documents for which name conformity is sought

Upon review of the application and supporting documentation, the Court may order the submission of other documents the Court deems relevant to the application.

The applicant must redact (black out) social security numbers, driver's license numbers, and driver's license issuance and expiration dates on all documents submitted to protect the privacy and confidential information of the applicant or minor.

D. Hearings on Adult Name Change and Adult Name Conformity Proceedings

Generally, the Court will require a hearing following a request for an adult name change or adult name conformity, however the Court shall have the discretion to dispense with the hearing when appropriate. In the event a hearing is scheduled, the Court will determine the manner, scope, and content of the hearing notice, however the applicant shall be responsible for serving the hearing notice.

E. Hearings on Minor Name Change and Minor Name Conformity Proceedings

In uncontested name change proceedings and name conformity proceedings for a minor in which the consent of both natural parents of the minor is filed simultaneously with the application, the Court generally will not require a hearing and will dispense with notice.

If an application for name change of a minor or application to conform name of a minor is filed without the written consent of both natural or adoptive parents, or if the Court determines that the application presents any irregularities or issues, the Court will schedule the application for a hearing. Notice of the hearing will comply with paragraph F of this Rule. The applicant must appear at the hearing. Children under 7 years of age are excused from the hearing on the application to change their name. Children who are 7 years of age or older must attend the hearing on the application to change their name. Attendance may be waived for good cause shown.

F. Service of Notice on Minor Name Changes and Minor Name Conformity Proceedings

Any parent or alleged father who has not consented to a minor's name change or name conformity will be served by the Court with notice of the hearing pursuant to Civ. R. 73. If a parent or alleged father's whereabouts are unknown, the Court will require the notice of hearing to be published, at the applicant's expense, to the parent or alleged father who has

not consented in a newspaper of general circulation in Seneca County, one time at least 30 days before the hearing.

G. Criminal Records Check

Upon review of the application and supporting documentation, the Court may order a criminal records check. Any fee required for the criminal records check must be paid by the applicant.

H. Confidentiality

If an applicant for a name change or name conformity desires the proceeding and the record to be confidential, the applicant must file a request for confidentiality supported by an affidavit or other sufficient proof that notice of the hearing or public access to the record would jeopardize the applicant's personal safety. A proposed entry must accompany the request. If the Court grants the applicant's request, the Court will waive notice and permanently seal the file.

**LOC. R. 75.10
(LOCAL RULES)**

The Court adopts any other Superintendence Rule that is deemed appropriate to practice, included but not limited to Rules 44-47.

**LOC. R. 75.11
(MARRIAGE LICENSE APPLICANTS)**

- (A) Pursuant to ORC §3101.02, if both applicants are the age of seventeen years, they may be joined in marriage only if the Juvenile Court has filed a consent to the marriage pursuant to ORC §3101.04.
- (B) Pursuant to ORC §3101.05, any applicant for a marriage license who is a minor must provide proof of participation in marriage counseling prior to applying for the license. The counseling can be provided by clergy or a person licensed by the State of Ohio to provide counseling. Proof of counseling may be in the form of a letter to this Court from the person who provided the counseling on his or her letterhead.
- (C) Both applicants must appear together at time of the application.
- (D) If both parties applying for a marriage license are residents of another state, the application must be made in the Ohio county wherein they will be married.
- (E) Proof of Identification: In addition to a photo ID, each applicant must supply the Court with

his/her current name, Social Security Number, address, age, date of birth, place of birth, occupation, the name of his/her father, the maiden name of his/her mother if known, and the name of the person who is expected to solemnize the marriage.

All applicants must present documentary proof of age in the form of any one of the following:

1. Copy of birth record;
2. A birth certificate;
3. A baptismal record showing date of birth;
4. A passport;
5. A license or permit to operate a motor vehicle;
6. Any government or school issued identification card showing date of birth;
7. An immigration record showing date of birth;
8. A naturalization record showing date of birth;
9. A court record or other government issued document showing date of birth

(F) Supporting documents written in a foreign language must be translated into the English language with a certification from the translator that the translation is true and accurate.

(G) If either applicant has been married previously and divorced, a certified copy of the most recent final decree or dissolution is required.

(H) If either applicant's spouse is deceased, a copy of the death record/certificate is required.

LOC R. 75.12 (GENERAL WAIVERS)

General waivers are not accepted by the Court. Waivers for probate of the will, inventory, accounting, waiver of right to administer, and waiver of application of notice of application to relieve the estate are all to be filed at the appropriate time.

LOC R. 75.13 (APPLICATION TO PROBATE WILL)

A. The Court will accept no more than two (2) co-executors to administer an estate.

B. The appointment of an out of state executor will be considered by the Court provided that:

1. The executor of executors are the sole beneficiaries.
2. All beneficiaries have agreed to the appointment.

3. The executor is a corporate fiduciary authorized to do business in Ohio.

LOC R. 75.14
(WILLS IN SAFE DEPOSIT BOX)

When a decedent has a safe deposit box, for which there is no authorized living signatory, and if there has not been a personal representative appointed for the decedent, then the Court, upon application, may appoint an attorney, or a suitable person-for the sole purpose of entering the safe deposit box, and recovering the decedent's will and codicils from the safe deposit box for delivery to the Court. A case number shall be assigned to the application. Appendix K, Application to Enter Safe Deposit Box and the Report of Entry of Safe Deposit Box, may be used for these purposes.

SUP. R. 76 EXCEPTION TO THE RULES

Upon application, and for good cause shown, the probate division of the Court of Common Pleas may grant exception to Sup. R. 53 to 79.

SUP. R. 77 COMPLIANCE

Failure to comply with these rules may result in such sanctions as the Court may direct.

**SUP. R. 78 PROBATE DIVISION OF THE COURT OF COMMON PLEAS --
CASE MANAGEMENT IN DECEDENT'S ESTATES, GUARDIANSHIP, AND TRUSTS**

- (A) Each fiduciary shall adhere to the statutory or Court-ordered time period for filing the inventory, account, and, if applicable, guardian's report and statement of expert evaluation. The citation process set forth in section 2109.31 of the Revised Code shall be utilized to ensure compliance. The attorney of record and the fiduciary shall be subject to the citation process. The Court may modify or deny fiduciary commissions or attorney fees, or both, to enforce adherence to the filing time periods.
- (B) A continuance to extend the time for filing an inventory, account, guardian's report or statement of expert evaluation shall not be granted unless the fiduciary has signed for the continuance or unless for good cause shown.
- (C) The Court may issue a citation to the attorney of record for a fiduciary who is

delinquent in the filing of an inventory, account, guardian's report, guardian's annual plan, or statement of expert evaluation to show cause why the attorney should not be barred from being appointed in any new proceeding before the Court or serving as attorney of record in any new estate, guardianship, or trust until all of the delinquent pleadings are filed.

- (D) Upon filing of the exceptions to an inventory or to an account, the exceptor shall cause the exceptions to be set for a pretrial within thirty days. The attorneys and their clients, or individuals if not represented by an attorney, shall appear at the pretrial. The trial shall be set as soon as practical after pretrial. The Court may dispense with the pretrial and proceed directly to trial.

LOC R. 78.1

(CASE MANAGEMENT OF ESTATES, GUARDIANSHIPS, TRUSTS, ET AL.)

A. SUPERVISION OF ESTATES, TRUSTS AND GUARDIANSHIPS

1. On or before the first day of October of each year, each Judge shall complete an annual physical inventory of cases reported as pending on the applicable statistical report forms. Within three months of initial election or appointment to the bench, each Judge shall complete a physical case inventory with subsequent inventories being due on or before the first day of October of each ensuing year. See, Sup. R. 38
 - a. The inventory involves the review of each case file to ensure an accurate count of pending cases. The Probate Judge will decide whether physically checking closed or inactive cases is necessary, but pending cases must be reviewed.
 - b. The inventory should give the status of each case.
 - c. A computer printout of cases may be used to begin the process of verifying pending cases, but a physical review of case files shall be conducted.
 - d. Documentation of the physical inventory requires reporting the date of the most recent inventory in the box provided on the statistical report forms.
2. Notice of Admission of Will to Probate.
 - a. When a will has been admitted to probate, the fiduciary. . . shall, within two weeks of the admission of the will to probate, give a notice . . . by certified mail to the surviving

spouse of the testator, to all persons who would be entitled to inherit from the testator. . . if the testator had died intestate, and to all legatees and devisees named in the will. The notice shall mention the probate of the will and, if a particular person being given the notice is a legatee or devisee named in the will, shall state that the person is named in the will as beneficiary. A copy of the will admitted to probate is not required to be given with the notice.

- b. The notice of the admission of the will to probate and the certificate of giving notice or waiver of notice shall be given or filed by the fiduciary for the estate or by the applicant for the admission of the will to probate, the applicant for a release from administration, any other interested person, or the attorney for the fiduciary or for any of the preceding persons. The certificate of giving notice shall be filed not later than two months after the appointment of the fiduciary unless the Court grants an extension that time. Failure to file the certificate in a timely manner shall subject the fiduciary to the citation and penalty provisions of section 2109.31 of the Revised Code.

1.) The Court keeps a tickler for the filing of the Certificate

- a.) If the certificate is not filed within 75 days after the appointment of the fiduciary, the Court will issue a citation to the attorney.

3. Notice to File Inventory in Estates, Trusts or Guardianships

- a. "Within three months after the date of the executor's or administrator's appointment, unless the Probate Court grants an extension of time for good cause shown, the executor or administrator shall file with the Court an inventory of the decedent's interest in real estate located in this state and of the tangible and intangible personal property of the decedent that is to be administered and that has come to the executor's or administrator's possession or knowledge. The inventory shall set forth values as of the date of death of the decedent. If a prior executor or administrator has done so, a successor executor or administrator need not file an inventory, unless, in the opinion of the court, it is necessary. Any asset, the value of which is readily ascertainable, is not required to be appraised but shall be included in the

inventory." R.C. 2115.02

- b. "Every guardian appointed to take care of the estate of a ward shall ... make and file within three months after his appointment a full inventory of the real and personal property of the ward, its value, and the value of the yearly rent of the real property, provided that, if the guardian fails to file the inventory for thirty days after he has been notified of the expiration of the time by the Probate Judge, the Judge shall remove him and appoint a successor." R.C.2111.14. If the guardianship is for the person only, an inventory is not required.
- c. "Each fiduciary as to whom definite provision is not made in Sections 2111.14 and 2115.02 of the Revised Code, shall make and file within three months after his appointment a full inventory of the real and personal property belonging to the trust, its value, and the value of the yearly rent of the real property." R.C. 2109.58
- d. Notice must go out timely to the fiduciary to file the inventory.
 - 1.) One month before the time required by R.C. sections 2115.02, 2111.14 and 2109.58 for the filing of the inventory, a reminder is sent to the attorney and fiduciary to indicate that an inventory will be due.
 - 2.) One month after the time required by R.C. sections 2115.02, 2111.14 and 2109.58 for the filing of the inventory, a notice is sent to the fiduciary and to the fiduciary's attorney to indicate that an inventory was due.
 - 3.) If the inventory is not filed within 15 days after the notices are sent, a citation is issued to the fiduciary and to the fiduciary's attorney pursuant to Sup. R. 78(A).
 - 4.) If the fiduciary fails to file the inventory timely, the fiduciary is subject to removal and a successor may be appointed.
 - 5.) The Court will grant an extension of time for good cause shown.

4. Surviving Spouse's Right of Election

- a. After the initial appointment of an administrator or executor of the estate, the probate Court shall issue a citation to the surviving spouse, if any is living at the time of the issuance of the citation, to elect whether to exercise the surviving spouse's rights under Chapter 2106 of the Revised Code, including, after the probate of a will, the right to elect to take under the will or under section 2105.06 of the Revised Code.
- b. The Court must notify the spouse of his or right of election unless the 8.6, Waiver of Service to Surviving Spouse of the Citation to Elect, is filed.

5. Accounting by the fiduciary.

a. Accounts of Administrators and Executors

- 1.) Within six months of appointment, every Administrator and executor shall render a final and distributive account of the administrator's or executor's administration of the estate, unless an application to extend has been filed and approved.
- 2.) After the initial account is rendered, every administrator and executor shall render further accounts at least once each year.

b. Accounts of Guardians and Conservators

- 1.) The first guardianship account is due one year after the appointment of a guardian of the estate and all other accounts are due annually thereafter. If the guardianship is for the person only, no account is required, except upon an order of the Court that the Court issues for good cause shown either at its own instance or upon the motion of any person interested in the estate.
- 2.) The first conservatorship account is due one year after the appointment of a conservator and all other accounts due annually thereafter.

c. Accounts of Testamentary Trustees and Other Fiduciaries

- 1.) The first trusteeship account is due one year after the appointment of the trustee and all other accounts due annually thereafter.
- 2.) Accounts for other fiduciaries are due one year after the appointment and all other accounts due annually thereafter.
 - a.) One month before the time required for the filing of any account, a reminder is sent to the attorney and fiduciary to indicate that an account will be due.
 - b.) One month after the time required for the filing of an account, a notice is sent to the fiduciary and to the fiduciary's attorney to indicate that an account was due.
 - c.) If an account is not filed 15 days after the notices are sent, a citation is issued to the fiduciary and the fiduciary's attorney pursuant to Sup.R. 78 (A).
 - d.) If the account is not timely, the fiduciary is subject to being removed with a successor fiduciary being appointed.
 - e.) When a final account is filed and approved and all Court costs paid, the case will be closed.
- d. The Court will grant extensions for the following reasons:
 - 1.) Extensions for Accounts of Administrators and Executors.
 - a.) An Ohio estate tax return must be filed for the estate.
 - b.) A proceeding contesting the validity of the decedent's will pursuant to section 2107.71 of the Revised Code has been commenced.
 - c.) The surviving spouse has filed an election to take against the will.

- d.) The administrator or executor is a party in a civil action.
- e.) The estate is insolvent.
- f.) For other reasons set forth by the administrator or executor, subject to Court approval, it would be detrimental to the estate and its beneficiaries or heirs to file a final and distributive account.

2.) Extensions for Accounts of Guardians and Conservators.

- a.) For good cause shown.

3.) Extensions for Accounts of Trustees and other fiduciaries.

- a.) For good cause shown

6. A Report of Distribution

- a. R.C. 2113.03 governs the procedure for releases of administration.
- b. A Report of Distribution is due 6 months after the Court signs the entry relieving the estate from administration.
 - 1.) One month before the time required for the filing of the Report of Distribution, a reminder is sent to the attorney and Commissioner to indicate that an account will be due.
 - 2.) One month after the time required for the filing of a Report of Distribution, a notice is sent to the Commissioner and to the Commissioner's attorney to indicate that the Report of Distribution was due.
 - 3.) If a Report of Distribution is not filed within 15 days after the notice is sent, a citation is issued to the commissioner and the commissioner's attorney pursuant to Sup.R. 78 (A).
 - 4.) When the commissioner's report is filed and approved and all Court costs paid, the estate is closed.

- 5.) The Court is able to accommodate extensions of time for the filing of a Report of Distribution.

7. Guardian's Report, Statement of Expert Evaluation, and Annual Guardianship Plans

- a. Seneca County Local Rule 66.08 requires that the guardian's report be filed one year after the appointment of the guardian and is due annually thereafter.
- b. Thirty (30) days before the time required by Seneca County Local Rule 66.08 for the filing of a guardian's report, a reminder is sent to the guardian and guardian's attorney to indicate a report will be due.
- c. Thirty (30) days after the time required by Seneca County Local Rule 66.08 for the filing of a guardian's report a notice is sent to the guardian and to the guardian's attorney to indicate a report was due.
- d. If the guardianship is for the estate only, a guardian's report and guardian's annual plan are required.
- e. Seneca County Local Rule 66.08 requires that a statement of expert evaluation prepared and signed by a Licensed Physician, Licensed Clinical Psychologist, Licensed Social Worker, or Developmental Disability Team is to be filed one year after the file date of the initial Statement of Expert Evaluation.
- f. A guardian may be excused from filing Statements of Expert Evaluation subsequent to the initial Statement of Expert Evaluation if the guardian files with the Court a Motion to Dispense with Subsequent Statements of Expert Evaluation and submits a proposed Order regarding same (Appendix J).
- g. The Court is able to accommodate extensions of time for filing the guardian's report and the statement of expert evaluation.
- h. Seneca County Local Rule 66.08 requires that the Annual Plan be filed annually as an addendum to the guardian's report.
- i. Thirty (30) days before the time required by Seneca County Local Rule 66.08 for the filing of the Annual Plan, a reminder is sent to the guardian and guardian's attorney to indicate a plan will be due.
- j. Thirty (30) days after the time required by Seneca County

Local Rule 66.08 for the filing of the Annual Plan, a notice is sent to the guardian and to the guardian's attorney to indicate a plan was due.

B. CASE MANAGEMENT OF ADVERSARY PROCEEDINGS

1. The following are primary categories of adversarial proceedings:
Will Contest, Declaratory Judgment, Determination of Heirs,
Construction of Will, Concealment of Assets, Complaint to Sell Real Estate,
Complaint to Purchase, Complaint for Judgment Entry Declaring
Will Valid, Presumption of Death Appropriations, and Complaint for
Instructions.
2. Physical inventory of all cases open and pending shall be
completed on or before October 1 of each year. Sup. R. 38
3. Each quarter an accounting of the case inventory is made listing all
new cases filed during the quarter, deleting all cases where final
judgment was rendered, and showing the total number of open
cases at the end of the quarter.
4. A pretrial conference is set 30 days after the answer date.
5. Notice of the pretrial conference shall be given to all attorneys of
record by mail at least 14 days prior to pretrial.
6. All requests for continuances of the pretrial conference shall be by
motion and shall be submitted to the Court at least 7 days prior to
the scheduled date for the pretrial conference, absent emergency
or cause deemed sufficient by the Court.
7. At the conclusion of the pretrial conference, the Court shall prepare
a pretrial order setting forth:
 - a. Discovery deadline date.
 - b. Exchange of witness list deadline date.
 - c. Pleading and briefing schedules.
 - d. A trial date.

C. MENTAL ILLNESS CASES

1. Physical inventory of all cases open and pending must be
completed on or before October 1 of each year. Sup. R. 38.
2. Each quarter an accounting of the prior quarter should be made.
 - a. Listing all new cases that were filed.

- b. Removing any cases where final judgment has been rendered.
- c. Listing the total number of cases open at the end of the quarter.

D. ADOPTION CASES

1. Physical inventory of all cases open and pending must be completed on or before October 1 of each year. Sup. R. 38.
2. Each quarter an accounting of the prior quarter should be made.
 - a. Listing all new cases that were filed.
 - b. Removing any cases where final judgment has been rendered.
 - c. Listing the total number of cases open at the end of the quarter.

E. MISCELLANEOUS CASES

1. The following are primary categories of miscellaneous cases:
Name Changes, Minor's Settlement, Adult Protective Services, etc.
2. Physical inventory of all open cases shall be completed on or before October 1 each year. Sup. R. 38
3. Each quarter an accounting of the case inventory is made listing all new cases filed during the quarter, deleting all cases where final judgment was rendered, and showing the total number of open cases at the end of the quarter.

LOC R. 79 (ADOPTION ASSESSOR)

As required by law, adoption assessors shall conduct home studies for the purpose of ascertaining whether a person or persons seeking to adopt a minor is/are suitable to adopt. A written report of the home study shall be filed with the Court at least twenty days before the petition for adoption is heard. The report shall contain the opinion of the assessor as to whether the person(s) who is the subject of the report is suitable to adopt a minor as well as additional material as is required under the laws of Ohio. Upon Order of the Court, the costs of the home study and other proceedings shall be paid by the person seeking to adopt, and, if the home study is conducted by a public agency or public employee, portions of the costs representing any services and expenses shall be taxed as costs and paid into the State treasury or County treasury, as the Court may direct.

The Seneca County Probate Court uses the following cost schedule:

Home Study Basic Fee: The basic fee for a step parent home study is \$500.00 for the first child and \$250.00 for each additional child. The basic fee for a private adoption is \$600.00 for the first child and \$300.00 for each additional child. This basic fee is for a home study report resulting from a single home visit. During this visit the assessor makes face-to-face contact with the prospective adoptive parent and the minor to be adopted, as well as all other children or adults residing in the prospective adoptive home.

Extraordinary Fees: The Court may Order an additional fee in certain instances including:

- (a) Upon Application of Assessor: An adoption assessor may make Application to the Court if they believe that additional fees should be assessed.
- (b) Adoption which would require extensive traveling: If the assessor must travel extensively, the Court, on a case by case basis, may issue an Order directing the Petitioner to pay an amount over and above any standard fee.

APPENDIX A
INITIAL DEPOSITS FOR COURT COSTS

Adoption Step Parent \$701.00

Step Parent 2nd child – \$424.00

Each additional child – \$424.00

Adoption Home Study \$500 for first child, \$250 for each additional child (included in adoption fee)

Agency placed adoption 1st child – \$201.00

Agency placed adoption 2nd child - \$174.00

Each additional child – \$174.00

Private Adoption \$801.00

Adoption Home Study \$600.00 (included in fee)

Adult Adoption \$174.00

Foreign Adoption \$231.00

Application for Placement \$791.00

Release of Adoption Information \$53.00

Estates-Full Administration \$218.00

Release from Administration \$153.00 (with will) \$173.00

Summary Release \$90.00 (with will) \$110.00

Reopen Estate \$54.00 (Full Administration) \$58.00 (Release Estate)

Exceptions to Inventory (Accounting) \$128.00

Claim Against Estate \$10.00

Insolvency \$128.00

Deposit Will \$60.00

Deposit Will & Tax \$53.00

Tax only – no Will \$48.00

Ancillary Administration \$218.00

Guardianship: Minor \$270.00
Each additional child \$183.00

Guardianship: Incompetent \$273.00

Conservatorship \$273.00

Transferring in Guardianship \$101.00

Motion to Terminate Guardianship \$43.00

Minor's Settlement \$148.00

Structured Settlement \$123.00

Name Change \$164.00 (does not include cost for publication)

Name Conformity \$164.00 (does not include cost for publication)

Wrongful Death \$138.00

Complaint to Sell Real Estate \$143.00

Trust \$155.00

Declaratory Judgment \$128.00

Marriage License \$70.00

Disinterment of Remains \$143.00

Foreign Transcript (coming in) \$48.00 plus \$1.00 per page

Transcript (going out) \$1.00 per page plus \$1.00 per certification

**DEPOSITS MUST ACCOMPANY ALL INITIAL FILINGS OF NEW CASES.
OTHERWISE, THE PAPERS WILL NOT BE ACCEPTED FOR FILING. ALL
DEPOSITS WILL BE APPLIED TOWARD FINAL COSTS. THE COURT MAY
REQUIRE ADDITIONAL DEPOSITS**

APPENDIX A-1

SCHEDULE OF COURT COSTS

I. R.C. 2101.16 Fees; cost of investigations; advance deposit

(A) The fees enumerated in this division shall be charged and collected by the Probate Judge and shall be in full for all services rendered in the respective proceedings:

1. Account, in addition to advertising charges.	12.00
Waivers and proof of notice of hearing on account, per page, minimum one dollar	1.00
2. Account of distribution, in addition to advertising charges	7.00
3. Adoption of Child, Petition for	20.00
4. Alter or Cancel Contract for Sale or Purchase of Real Estate, Petition to	20.00
5. Application and order not otherwise provided for in this section or by rule adopted pursuant to division (E) of this section	5.00
6. Appropriation Suit, per day, hearing on	20.00
7. Birth, Application for Registration of	7.00
8. Birth Record, Application to Correct	5.00
9. Bond, Application for New or Additional	5.00
10. Bond, application for release of surety or reduction of	5.00
11. Bond, receipt for securities deposited in lieu of	5.00
12. Certified copy of journal entry, record, or proceeding, per page, minimum fee one dollar.	1.00
13. Citation and Issuing Citation, Application for	5.00
14. Change of Name, Petition for	20.00
15. Claim, Application of Administrator or Executor for Allowance of Administrator's or Executor's Own	10.00
16. Claim, Application to Compromise or Settle	10.00
17. Claim, Petition for Authority to Present	10.00
18. Commissioner, Appointment of	5.00
19. Compensation for Extraordinary Services and Attorney's Fees for Fiduciary Application for	5.00
20. Competency, Application to Procure Adjudication for	20.00
21. Complete Contract, Application to	10.00
22. Concealment of Assets, Citation for	10.00
23. Construction of Will, Petition for	20.00
24. Continue Decedent's Business, Application to	10.00
Monthly Reports of Operation	5.00
25. Declaratory Judgment, Petition for	20.00
26. Deposit of Will	25.00
27. Designation of Heir	20.00
28. Distribution in Kind, Application, Assent, and Order for	5.00
29. Distribution under §2109.36 of the Revised Code, Application for an Order of	7.00
30. Docketing and indexing proceedings, including the filing and noting of all necessary documents, maximum fee \$15.00	15.00
31. Exceptions to any Proceeding Named in this Section, Contest of Appointment	10.00
32. Election of Surviving Partner to Purchase Assets of Partnership, Proceedings Relating to	10.00
33. Election of Surviving Spouse Under Will	5.00
34. Fiduciary, Including an Assignee or Trustee of an Insolvent Debtor or any Guardian or Conservator Accountable to the Probate Court, Appointment of	35.00

35. Record of such Will, additional per page	1.00
36. Forms, when supplied by the Probate Court - not to exceed	10.00
37. Heirship, Petition to Determine	20.00
38. Injunction Proceedings	20.00
39. Improve Real Estate, Petition to	20.00
40. Inventory with Appraisement	10.00
41. Inventory without Appraisement	7.00
42. Investment or Expenditure of Funds, Application for	10.00
43. Invest in Real Estate, Application to	10.00
44. Lease for Oil, Gas, Coal, Other Mineral, Petition to	20.00
45. Lease or Lease and Improve Real Estate, Petition to	20.00
46. Marriage License	10.00
Certified abstract of each marriage	2.00
47. Minor or Mentally Ill Person, Etc., Disposal of Estate Under \$10,000	10.00
48. Mortgage or Mortgage and Repair or Improve Real Estate, Petition to	20.00
49. Newly Discovered Assets, Report of	7.00
50. Nonresident Executor/Administrator to Bar Creditors' Claims, Proceedings by	20.00
51. Power of Attorney or Revocation of Power, Bonding Company	10.00
52. Presumption of Death, Petition to Establish	20.00
53. Probating Will	15.00
Proof of notice to beneficiaries	5.00
54. Purchase Personal Property, Application of Surviving Spouse to	10.00
55. Purchase Real Estate at Appraised Value, Petition of Surviving Spouse to	20.00
56. Receipts in Addition to Advertising Charges, Application and Order to Record	5.00
Record of those receipts, additional, per page 1.00	
57. Record in excess of fifteen hundred word in any proceeding in the Probate Court, per page	1.00
58. Release of estate by mortgagee or other lienholder	5.00
59. Relieving estate from administration	60.00
60. Removal of Fiduciary, Application for	10.00
61. Requalification of Executor or Administrator	10.00
62. Resignation of Fiduciary	5.00
63. Sale Bill, Public Sale of Personal Property	10.00
64. Sale of Personal Property and Report, Application for	10.00
65. Sale of Real Estate, Petition for	25.00
66. Terminate Guardianship, Petition to	10.00
67. Transfer of Real Estate, Application, Entry and Certificate Fee	7.00
68. Unclaimed Money, Application to Invest	7.00
69. Vacate Approval of Account or Order of Distribution, Motion to	10.00
70. Writ of Execution	5.00
71. Writ of Possession	5.00
72. Wrongful Death, Application and Settlement of Claim for	20.00
73. Year's Allowance, Petition to Review	7.00
74. Guardian's Report, Filing and Review of	5.00
75. Statement of Expert. Evaluation	3.00
76. Annual Guardianship Plan of Person and Review of	5.00
77. Annual Guardianship Plan of Estate and Review of	5.00
78. Name Conformity, Application of	20.00

(B) (1) In relation to an application for the appointment of a guardian or the review of a report of a guardian under Section 2111.49 of the Revised Code, the Probate Court, pursuant to Court

order or in accordance with a Court Rule, may direct that the applicant or the estate pay any or all of the expenses of an investigation conducted pursuant to Section 2111.041 or division (A)(2) of Section 2111.49 of the Revised Code. If the investigation is conducted by a public employee or investigator who is paid by the county, the fees for the investigation shall be paid into the county treasury. If the Court finds that an alleged incompetent or a ward is indigent, the Court may waive the costs, fees, and expenses of an investigation.

(2) In relation to the appointment or functioning of a guardian for a minor or the guardianship of a minor, the Probate Court may direct that the applicant or the estate pay any or all of the expenses of an investigation conducted pursuant to Section 2111.042 of the Revised Code. If the investigation is conducted by a public employee or investigator who is paid by the county, the fees for the investigation shall be paid into the county treasury. If the Court finds that the guardian or applicant is indigent, the Court may waive the costs, fees, and expenses of an investigation.

(C) Thirty dollars of the \$35 dollar fee collected pursuant to division (A)(33) of this section and \$20 of the \$60 fee collected pursuant to division (A)(58) of this section shall be deposited by the county treasurer in the indigent guardianship fund created pursuant to Section 2111.51 of the Revised Code.

(D) The fees of witnesses, jurors, sheriffs, coroners, and constables for services rendered in the Probate Court or by order of the Probate Judge, shall be the same as provided for like services in the Court of Common Pleas.

(E) The Probate Court, by rule, may require an advance deposit for costs, not to exceed \$125, at the time application is made for an appointment as executor or administrator or at the time a will is presented for Probate.

(F) The Probate Court, by rule, shall establish a reasonable fee, not to exceed \$50, for the filing of a petition for the release of information regarding an adopted person's name by birth and the identity of the adopted person's biological parents and biological siblings pursuant to Section 3107.41 of the Revised Code, all proceedings relative to the petition, the entry of an order relative to the petition, and all services required to be performed in connection with the petition. The Probate Court may use a reasonable portion of a fee charged under authority of this division to reimburse any agency, as defined in Section 3107.39 of the Revised Code, for any services it renders in performing a task described in Section 3107.41 of the Revised Code relative to or in connection with the petition for which the fee was charged.

(G) (1) Thirty dollars of the \$30 fee collected pursuant to division (A)(2) of this section shall be deposited into the "Putative Father Registry Fund", which is hereby created in the state treasury. The Department of Human Services shall use the money in the fund to fund the department's costs of performing its duties related to the Putative Father Registry established under Section 3107.062 of the Revised Code.

(2) If the department determines that money in the putative father registry fund is more than is needed for its duties related to the putative father registry, the department may use the surplus moneys in the fund as permitted in division © of section 2151.3529 [2151.35.29], division (B) of section 2151.3530 [2151.35.30], or section 5103.155 [5103.15.5] of the Revised Code.

DOD 4/15/00 or before

APPENDIX B

**COMPUTATION OF ATTORNEY FEES
IN THE PROBATE COURT OF SENECA COUNTY, OHIO**

ESTATE OF _____ **Case Number:** _____

TOTAL ASSETS = (PER INVENTORY) \$ _____

0 - \$5,000.00	6%	\$ 300.00
\$5001.00 - \$15,000.00	4% OVER	\$ 5,000.00
OVER \$15,000.00	3% OVER	\$15,000.00

1. PROBATE FEE TOTAL \$ _____

**TOTAL NON-PROBATE ASSETS
(AS VALUED IN THE OHIO ESTATE TAX RETURN):**

\$ _____

A. Non-Probate – Living Trust

Up to \$25,000.00	3.5%	\$ _____
Over \$25,000.00	2.5%	\$ _____

B. Non-Trustee Assets

Up to \$25,000.00	2%	\$ _____
-------------------	----	----------

Over \$25,000.00	1%	\$ _____
------------------	----	----------

2. NON-PROBATE FEE TOTAL \$ _____

EXTRAORDINARY FEES (ITEMIZED AND ATTACHED TIME RECORDS, IF AVAILABLE)

1. _____ _____
2. _____ _____
3. _____ _____
4. _____ _____

3. EXTRAORDINARY FEES TOTAL \$ _____

Total Attorney Fee: (SUM OF 1, 2, & 3,)	\$ _____
Attorney Fee Taken on Prior Account	(-) _____

Balance Of Attorney Fees Requested on Final Account	\$ _____
---	----------

ATTORNEY'S SIGNATURE

Typed or Printed Attorney's Name

Date Approved by the Court

FIDUCIARY'S SIGNATURE

Typed or Printed Fiduciary's Name

Jay A. Meyer, Probate Judge

Use after DOD 4/15/00

**APPENDIX B-1
COMPUTATION OF ATTORNEY FEES FOR ESTATE**

ESTATE OF _____ CASE NO. _____

- | | |
|--|----------|
| 1. 5% of all probate assets, including
real estate <u>sold</u> | \$ _____ |
| 2. 3% of all <u>transferred</u> real estate | \$ _____ |
| 3. 2% of first \$20,000.00 | \$ _____ |
| 1% of balance of all property subject to Ohio Estate tax,
such as joint and survivorship, power of
appointment, contemplation of death,
annuities, pension or profit sharing,
Excluding life insurance paid to beneficiary. Sub total | |
| | \$ _____ |
| 4. Attorney acting also as fiduciary is
entitled to one-half of sub-total | \$ _____ |
| 5. Advances court costs | \$ _____ |
| 6. Advanced recording costs | \$ _____ |
| 7. Costs | \$ _____ |
| Total | \$ _____ |

Approved and authorized:

Approved:

Executor/Administrator

Attorney

IT IS SO ORDERED.

Judge

APPENDIX B-2

EXAMPLES OF EXTRAORDINARY SERVICES

Examples of extraordinary services which may be compensated in addition to the foregoing suggested guidelines on ordinary fees include, but are not limited to, the following:

- A. In a Court other than the Probate Court.
- B. In a contested matter in the Probate Court.
- C. In connection with the preparation or filing, audit, protest or contest of an income or gift tax return, or liability incurred by the decedent or personal representative.
- D. In connection with the settlement of estate or inheritance taxes with respect to insurance not payable to the estate, gifts in contemplation of death, or general testamentary powers of appointment not exercised by the decedent, and other negotiation not represented by assets included in the "gross value" of the estate.
- E. With respect to problems of valuation or taxability of property for estate and inheritance taxes or to the protest of such taxes.
- F. Preparation and filing of the federal estate tax returns.
- G. In connection with matters which are unusual or excessive for the size of the estate involved.
- H. In connection with the performance of duties normally performed by the personal representative, but which fall to the lawyer because of personal representative's inexperience, lack of ability, or absence from the place from which the assets of an estate must be managed.
- I. Sale of business or business assets.
- J. Proceedings to determine heirship.
- K. Proceedings involving partnership.
- L. Sale of real estate by land sale or election of spouse to take at appraisal value.

APPENDIX C
COMPUTATION OF GUARDIAN FEES
IN THE PROBATE COURT OF SENECA COUNTY, OHIO

Case Name: _____ Case Number: _____

ACCOUNTING PERIOD OF: _____, _____ to _____, _____

ORDINARY FEES

Total Income During Period	\$	
I. \$0-\$1,000 Income @ 4%		
(excludes income from rental property managed by guardian)	\$	
\$1,000 - Up Income @ 3%	\$	
Total Fee from Income		\$
Total Expenses During Period	\$	
II. \$0-\$1,000 Expenses @ 4%		
(excludes rental property expenses)	\$	
\$1,000 - Up Expenses @ 3%	\$	
Total Fee from Expenses		\$
III. Principal at Beginning of Accounting Period \$		
times (x) .0015	\$	
Total Fee from Principal		\$
IV. Gross Rental Property Income from Property		
Managed by Guardian times (x) .10	\$	
Total Fee from Rental Income		\$
V. Extraordinary Fees		
(itemize and attach time records)		
A. _____	\$	
B. _____	\$	
C. _____	\$	
D. _____	\$	
Total Extraordinary Fees		
\$ _____		
Total I-V		
\$ _____		
Total Fees Requested		\$ _____

ATTORNEY'S SIGNATURE

Typed or Printed Attorney's Name

Date Approved by the Court

FIDUCIARY'S SIGNATURE

Typed or Printed Fiduciary's Name

Jay A. Meyer, Probate Judge

APPENDIX C-1
GUARDIAN FEE GUIDELINES

A. COMPUTATION OF GUARDIAN FEES – ANNUALLY

1. \$0 - \$1,000.00 income
 4% of income (excludes income from rental property managed by guardian)

 \$1,000.00 - up income
 3% of income
2. \$0 - \$1,000.00 expenses
 4% of expenses (excludes rental property expenses)
3. \$1.50 per thousand principal
4. 10% of gross rental property income if managed by guardian
5. Minimum of \$50.00 per year

B. ATTORNEY FEES

1. Attorney fees up to \$200.00 for representing a guardian subsequently appointed including the filing of an inventory and an entry approving the inventory will normally be approved without application.
2. Attorney fees up to \$225.00 for preparing and filing an annual account and entry approving said account will normally be approved without application.

APPENDIX C-2
COMPUTATION OF ATTORNEY FEES FOR GUARDIANSHIP

GUARDIANSHIP OF _____ CASE NO. _____

- | | |
|--|----------|
| 1. 3% of the income during the accounting period | \$ _____ |
| 2. 3% of expenditures during accounting period
(Not including any expenditures for attorney fees) | \$ _____ |
| 3. 5% for Sale of Real Estate proceedings | \$ _____ |
| 4. Attorney acting also as guardian is entitled
to one-half of sub-total (Per Local Rule 71.6) | \$ _____ |
| 5. Advanced court costs. | \$ _____ |

Total

\$ _____

Approved and authorized:

Guardian

Attorney

IT IS SO ORDERED.

Judge

**APPENDIX D
TRUSTEE'S FEE COMPUTATION
IN THE PROBATE COURT OF SENECA
COUNTY, OHIO**

Case Name: _____ Case Number: _____

- | | | | |
|---|-----|----|--|
| 1. 6% of the first \$1,000.00 | fee | \$ | |
| 2. 4% of the next \$4,000.00 | fee | \$ | |
| 3. 2% of all income over \$5,000.00 | fee | \$ | |
| 4. Principle | | | |
| Fee of \$1.50/\$1,000.00 on first \$500,000.00 | | \$ | |
| Fee of \$1.00/\$1,000.00 on balance over \$500,000.00 | | \$ | |
| | fee | \$ | |
| 5. Principle Distribution Fee | | | |
| 1% | fee | \$ | |

RECAPITULATION

Item 1 Fee	\$	
Item 2 Fee	\$	
Item 3 Fee	\$	
Item 4 Fee	\$	
Item 5 Fee	\$	
Item V. Fee	\$	
Extraordinary Fees (from application)	\$	
Total Fees Requested		\$ _____

ATTORNEY'S SIGNATURE

FIDUCIARY'S SIGNATURE

Typed or Printed Attorney's Name

Typed or Printed Fiduciary's Name

Date Approved by the Court

Jay A. Meyer, Probate Judge

APPENDIX D-1
TRUSTEE FEE GUIDELINES

1. Income from realty and personal as follows:
 - 6% of the first \$1,000.00
 - 4% of the next \$4,000.00
 - 2% of all income over \$5,000.00
2. In addition thereto, there shall be a fee allowed of \$1.50 per \$1,000.00 on the first \$500,000.00 of the corpus of the trust and \$1.00 per \$1,000.00 on the balance over \$500,000.00. This amount shall be based upon the reasonable current market value of the corpus both real and personal handled by the fiduciary chargeable to the principal, except that, with the written consent of the income beneficiaries, all or a portion of said fee may be chargeable to income.
3. In addition thereto, there shall be a distribution fee on the corpus both real and personal of 1% based upon the reasonable market value of the property at the time of distribution.
4. Except on special application, when an attorney or his associate or partner serve in the dual capacity as attorney for the trust or trustee, the total fees charged in both capacities shall not exceed one and one-half times the trustee's fee allowable.

APPENDIX E
COMPUTATION OF EXECUTOR/ADMINISTRATOR FEES
IN THE PROBATE COURT OF SENECA COUNTY, OHIO

Estate of: _____ Case Number: _____

Total personal property probate assets
and real estate sold under authority in
will or order of court per 2113.35

\$ _____

\$1 - \$100,000.00
\$100,001 - \$400,000.00
\$400,001 -

\$ _____ x .04 = \$ _____
\$ _____ x .03 = \$ _____
\$ _____ x .02 = \$ _____

SUB TOTAL

\$ _____

REAL ESTATE NOT SOLD

Appraiser Value

\$ _____ x .01 = \$ _____

Real Estate not subject to administration but is includable for
purposes for computing Ohio Estate Tax, except joint and
survivorship property. Appraised value

\$ _____ x .01 = \$ _____

All property not subject to administration that is
includable for purposes of computing Ohio Estate
Tax, except joint and survivorship property. \$ _____

x .01 = \$ _____

PER AGREEMENT

TOTAL

\$ _____

ATTORNEY'S SIGNATURE

FIDUCIARY'S SIGNATURE

Typed or Printed Attorney's Name

Typed or Printed Fiduciary's Name

Date Approved by the Court

Jay A. Meyer, Probate Judge

APPENDIX E-1
EXECUTOR/ADMINISTRATOR GUIDELINES
O.R.C. 2113.35

4% on the first \$100,000

3% on all above \$100,000 and not exceeding \$400,000

2% on everything over \$400,000

1% on the value of real estate that is not sold

1% on the value of all property that is not subject to administration and that is includable for purposes of the Ohio estate tax, except joint and survivorship property.

APPENDIX I

SENECA COUNTY PROBATE COURT RECORDS RETENTION SCHEDULE

<i>Record Title</i>	<i>Retention Period</i>	<i>Media Type</i>
Administrative	Sup. Rule 26.01	
Bank Records	3 years (and completed audit)	Various
Cash Books	3 years (and completed audit)	Various
Daily Correspondence (messages, notes, emails not essential to case file)	Destroyed in course of business	Various
Supreme Court (Annual) Report	2 Copies kept permanently	Various
Employment applications	2 years for posted positions	Various
Employee Benefit and Leave (insurance info/applications)	3 years (and completed audit)	Various
Employee History and Discipline	10 years after termination	Various
Fiscal (budgets and purchasing)	3 years	Various
Payroll Records	3 years	Various
Receipts and Cashbook Balancing	3 years (and completed audit)	Various
Contracts, Bids, Proposals	3 years	Various
Case Records	Sup. Rule 26.04	
Adoptions	Permanent	Various
Birth Records	Permanent	Paper
Death Records	Permanent	Paper
Estates	26.04 (E)(8)	Various
Civils	26.04 (E)(8)	Various

<i>Record Title</i>	<i>Retention Period</i>	<i>Media Type</i>
Marriage	Permanent	Various
Non-adj. Civil Commitments	Destroyed upon dismissal	Paper
Civil Commitments	3 Years after Closing	Paper
Trusts	26.04 (E)	Various
Guardianships	26.04 (E)(8)	Various
Name Changes	26.04 (E)	Various
All Other Case Types	26.04 (E)	Various
Indexes, Journals, Dockets	26.04 (E)(4)	Various
Audio, Video, Steno, Transcripts (any media used to record a hearing)	10 years	Audio
Exhibits	45 days following expiration of appeal time	Various

APPENDIX J

PROBATE COURT OF SENECA CPUNTY, OHIO JAY A. MEYER, JUDGE

In the Matter of the Guardianship of: _____

Case Number: _____

MOTION TO DISPENSE WITH SUBSEQUENT STATEMENTS OF EXPERT EVALUATION

The Guardian states that the Statement of Expert Evaluation filed _____
Indicates that to a reasonable degree of medical or psychological certainty that the mental
capacity of this ward will not improve. Therefore, the Guardian requests the Court to dispense
with the filing of additional Statements of Expert Evaluation.

Signature of Attorney

Signature of Guardian

Attorney's Name

Guardian's Name

Attorney Registration Number

ORDER

Upon review of the referenced Statement of Expert Evaluation, and for good cause
shown, the motion is approved and the Court dispenses with the filing of subsequent
Statements of Expert Evaluation (Standard Probate Form 17.1) until further Order of this
Court. The guardian shall continue to file annual Guardian's Reports (Standard Probate Form
17.7) and Annual Guardianship Plans of Person and/or Annual Guardian Plans of Estate
(Standard Probate Forms 27.7 and 27.8) as due.

IT IS SO ORDERED.

Jay A. Meyer, Judge

MOTION TO DISPENSE WITH SUBSEQUENT STATEMENTS OF EXPERT EVALUATION

APPENDIX K

**PROBATE COURT OF SENECA COUNTY, OHIO
JAY A. MEYER, JUDGE**

**ESTATE OF _____,DECEASED
CASE NO. _____**

**APPLICATION FOR APPOINTMENT OF A COMMISSIONER TO REPORT ON
THE CONTENTS OF A SAFE DEPOSIT BOX**

Now comes _____, and states decedent, who resided at _____, died on _____ and requests the appointment of him/her self, as Commissioner to review and report the contents of the decedent's safe deposit box located at _____, a financial institution in the City/Township of _____, State of Ohio. Applicant requests that as Commissioner he/she be permitted to remove the decedent's will(s) and codicil(s) from the safe deposit box and deliver the will(s) and codicil(s) to the Court, along with a written report of the contents of the safe deposit box.

Attorney

Typed or Printed Name

Address

Phone Number (include area code)

Attorney Registration No. _____

ENTRY

Upon review of the above Application and for good cause shown, the Court hereby appoints Attorney _____, as Commissioner to open the decedent's safe deposit box in the presence of an employee of the above listed financial institution to inventory the contents of the safe deposit box, and to report in writing to the Court the contents of the safe deposit box as well as to deliver any will(s) and codicil(s) of the decedent to the Court, no later than 30 days from the date of this Entry. The report shall be

signed and dated by the Commissioner/Attorney, as well as by an employee of the institution where the safe deposit box is located.

With the exception of any will(s) and codicil(s), no other property shall be released from the safe deposit box until presentation of Letters of Authority or upon further order of this Court.

Date

Jay A. Meyer, Judge

APPENDIX L

**PROBATE COURT OF SENECA COUNTY, OHIO
JAY A. MEYER, JUDGE**

ESTATE OF: _____, **DECEASED**

CASE NO.: _____

**APPLICATION TO ADMIT LOST, SPOLIATED OR DESTROYED WILL TO PROBATE
(R.C. 2107.26-2107.28)**

Applicant states that the Decedent died on _____

Decedent's domicile was _____
Street Address

City, Village, or Township if unincorporated area County

Post Office State Zip Code

A document purporting to be Decedent's last will is attached and offered for probate.

Decedent's surviving spouse, all persons who would be entitled to inherit from the testator under Chapter 2105 of the Revised Code if the testator had died intestate, all legatees and devisees who are named in the will, and all legatees and devisees who are named in the the most recent will prior to the lost, spoliated or destroyed will, known to applicant are listed on the attached Form 1.0.

The Applicant will further cause all persons who witnessed the will, or who have relevant and material knowledge about the will, to appear before this Court to give testimony.

Attorney for Applicant's Signature

Applicant's Signature

Typed or Printed Name

Typed or Printed Name

Address

Address

City, State, Zip Code

City, State, Zip Code

Telephone Number (include area code)

Telephone Number (include area code)

Attorney's Registration No.

JOURNAL ENTRY SETTING HEARING

The Court sets the _____ day of _____ 20_____, at
_____ o'clock ____ m. as the date and time for hearing the above application. The Court
orders the applicant to serve notice by certified mail as required and file the proof of service.

Jay A. Meyer, Judge

APPENDIX M

**PROBATE COURT OF SENECA COUNTY, OHIO
JAY A. MEYER, JUDGE**

ESTATE OF: _____, **DECEASED**
CASE NO.: _____

**VERIFICATION OF SERVICE
NOTICE OF HEARING ON APPLICATION TO ADMIT LOST WILL TO
PROBATE
(LOCAL RULE 59.3)**

The undersigned does hereby verify that, unless waived, written notice to all persons entitled to notice of the Application, pursuant to ORC §2107.27(A), have been notified of the filing of the Application and of the hearing thereon, no less than 5 days prior to the hearing, by personal service or certified mail.

Attached hereto are the proofs of service and/or waivers of notice.

Applicant/Attorney for Applicant

Typed or Printed Name

Address

Phone Number (include area code)

Attorney Registration No. _____

APPENDIX N

PROBATE COURT OF SENECA COUNTY, OHIO
JAY A. MEYER, JUDGE

IN THE MATTER OF _____
CASE NO. _____

APPLICATION REQUESTING PERMISSION TO BROADCAST, TELEVISION,
PHOTOGRAPH, RECORD COURTROOM PROCEEDINGS

The person(s) below hereby requests permission to broadcast, televise, photograph or otherwise record proceedings in the above captioned case under the provisions of Ohio Superintendence Rule 12. We hereby certify that the conditions for recording established by the Supreme Court of Ohio and such rules as are established by this Court will be complied with and any cost arising therefrom shall be borne by the undersigned applicant.

Listed below are signatures of attorneys, parties, or witnesses who have specifically granted their consent to authorization of this request. (See Exhibit "A" for additional signatures).

Consent

Applicant

ENTRY GRANTING APPROVAL

The Court, upon consideration of the above request, hereby grants its authorization to broadcast, televise, photograph or otherwise record judicial proceedings in the above captioned matter subject to the following conditions:

No witness, victim or juror who has objected to recording will be recorded until the Court has determined that there is no reasonable cause for such objection.

Further conditions are as follows:

Jay A. Meyer, Judge