

**PROBATE COURT OF COSHOCTON COUNTY, OHIO
JASON W. GIVEN, JUDGE**

IN THE MATTER OF THE: TESTAMENTARY TRUST SPECIAL NEEDS TRUST
 WRONGFUL DEATH TRUST OTHER _____

OF _____, DECEASED, GRANTOR
Case No. _____

APPLICATION FOR APPOINTMENT OF TRUSTEE

Now comes _____ and hereby make(s) application to be appointed Trustee(s) of the:

- Testamentary Trust** created by Item _____ of the Last Will and Testament of _____, deceased, Estate case no. _____;
- Wrongful Death Trust** fbo _____ as a result of the death of _____, Estate case no. _____;
- Special Needs Trust** created by _____ on _____; Month, Day, Year
- Other Trust, more particularly** _____ created by _____ on _____; Month, Day, Year

and states that the estimated property of said trust, is as follows:

Personal Property	\$	_____
Real Property	\$	_____
Annual rentals	\$	_____
Other	\$	_____
TOTAL	\$	_____

and states that:

- Bond is dispensed with by the instrument;
- Bond in the sum of \$ _____ is attached;

Attorney for Applicant

Typed or Printed Name

Address

City, State, Zip

Telephone Number (include zip code)

Attorney Registration No.

Applicant signature

Print or Type Applicant Name

Address

City, State, Zip

Telephone

PROBATE COURT OF COSHOCTON COUNTY, OHIO
JASON W. GIVEN, JUDGE

IN THE MATTER OF THE:

TESTAMENTARY TRUST
 SPECIAL NEEDS TRUST

WRONGFUL DEATH TRUST
 OTHER _____

OF _____, DECEASED, GRANTOR

Case No. _____

FIDUCIARY'S ACCEPTANCE TRUSTEE

[Revised Code, Sec. 2109.02]

I hereby accept the duties which are required by me by law, and such additional duties as are ordered by the Court.

As Trustee of this estate I will:

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

I acknowledge that I am subject to removal as such trustee if I fail to perform my fiduciary duties.

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

NOTE: ORC §2109.02 states that every fiduciary, before entering into the execution of a trust, shall receive letters of appointment from a Probate Court having jurisdiction of the subject matter of the trust.

The duties of a fiduciary shall be those required by law, and such additional duties as the Court orders. Letters of appointment shall not issue until a fiduciary has executed a written acceptance of those duties, acknowledging the possibility of removal for failure to perform those duties, and further being subject to possible penalties for conversion of property held as a fiduciary. The written acceptance of duties may be filed with the application for appointment.

Signed _____
Fiduciary

Date: _____

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

IN THE MATTER OF

TESTAMENTARY TRUST

SPECIAL NEEDS TRUST

WRONGFUL DEATH

OTHER _____

OF: _____, Deceased, Grantor

For the Benefit of: _____

CASE NO. _____

**ENTRY APPOINTING TRUSTEE
LETTERS OF AUTHORITY**

Name of Trustee: _____

Name(s) of Co-Trustee(s) [if any]: _____

On hearing in open court on the application for appointment of trustee, the Court finds that the Applicant is a suitable and competent person to execute the trust, that applicant has filed a written acceptance of duties as Trustee and that the Trustee's Bond has been

[Check one of the following]:

Bond is dispensed with by the instrument

Bond is dispensed with by law

Applicant has executed and filed an appropriate bond, which is approved by this Court.

The Court therefore appoints applicant as Trustee. This entry of appointment constitutes the trustee's letters of authority.

Date

Jason W. Given, Probate Judge

CERTIFICATE OF APPOINTMENT AND INCUMBENCY

The above document is a true copy of the original kept by me as custodian of the records of this Court. It constitutes the appointment and letters of authority of the named fiduciary, who is qualified and acting in such capacity.

Judge

Deputy Clerk

Date