

**CUYAHOGA COUNTY COURT OF COMMON PLEAS
PROBATE DIVISION
CUYAHOGA COUNTY, OHIO**

CHECKLIST FOR FILING INVENTORIES FOR GUARDIANSHIPS

Submitting the required documents does not guarantee approval of the Guardian's Inventory

All forms must be typed or legibly printed (clear, readable text) in black or blue ink

Required documents that are mandatory for the Court to *accept* the Guardian's Inventory for filing:

- Guardian's Inventory (Form 15.5)
 - Guardian of Estate *must* sign the form
 - Complete all applicable fields
 - The Ward's assets must be listed on the Guardian's Inventory with the exact values of the assets— attach additional page(s) if necessary
 - All assets of the Ward and their values must be listed, including, but not limited to:
 - Business and/or financial accounts identified by account numbers
 - Insurance policies with policy number/ID number
 - Stock name and number of shares
 - Bond serial numbers
 - Real property, including the County Auditor's value or appraisal value
 - Automobile make, model, & VIN with Kelley Blue Book/NADA/Edmunds value
 - Yearly rental income
 - Other annual income, i.e. social security, pension, VA pension, etc.

These supplemental documents are not mandatory for the Court to *accept* the Guardian's Inventory for filing; however, the Guardian's Inventory cannot be *approved* without verification of the following, if applicable:

- Confidential Disclosure of Personal Identifiers, Form 45(D), *may* be filed by the guardian to keep full account numbers confidential
- Documentation of County Auditor value or appraisal value for real property
- Documentation of the Kelley Blue Book/NADA/Edmunds values for automobiles

**CUYAHOGA COUNTY COURT OF COMMON PLEAS
PROBATE DIVISION
CUYAHOGA COUNTY, OHIO**

**CHECKLIST FOR FILING GUARDIAN'S ACCOUNTS
R.C. 2109.302**

**Submitting the required documents does not guarantee approval of the Guardian's Account
All forms must be typed or legibly printed (clear, readable text) in black or blue ink**

Required documents that are mandatory for the Court to *accept* the Guardian's Account for filing:

- Guardian's Account (Form 15.8)
 - Guardian *must* sign the form
 - Applies to Partial, Final, and Special Final Accounts
- Form 15.8 must include separate categories for receipts and disbursements
- Form 15.8 must also include an itemization of all assets remaining in guardian's hands at the end of the accounting period
 - Must include an itemized statement of all funds, assets, and investments of the guardianship estate in the possession of the guardian at the end of the accounting period and shall show any changes in investments since the last previous account
- Attach any spreadsheets and worksheets supporting the line items on Form 15.8

These supplemental documents while not mandatory for the Court to accept the Guardian's Account for filing; the Guardian's Account cannot be *approved* without verification of the following, if applicable:

- Additional Pages of Accounting
- Vouchers or proof of disbursements and distributions to supplement the receipts and disbursements
- Confidential Disclosure of Personal Identifiers, Form 45(D), *may* be filed by the guardian to keep full account numbers confidential
- Certificate of Service of Account (Form 15.8C)— *must* be filed for Final and Special Final Accounts
- Computation of Guardian's Fees— *must* be filed if the guardian is taking a guardian's fee
- Service, if applicable:
 - Waivers of Notice of Hearing and Consent to Account (Form 15.8W)
 - Notice of Hearing on Account (Form 15.8N) required with some Final Accounts for parties who did not sign the Waiver (Form 15.8W)