

## DOCUMENTS THAT MAY BE NEEDED

You should bring the following documents to the probate court if you are filing a summary release of estate from administration or a release of estate from administration without an attorney:

- I. Certified copy of the decedent's death certificate.
- II. Copy of the decedent's funeral bill and any receipts to show if the funeral bill has been paid and by whom. **A summary release of estate from administration case may not be filed by a non-spouse if the decedent's funeral bill was prepaid or the decedent's body was donated to a medical school. In summary release of estate from administration cases, filed by a non-spouse, the assets must be equal to or less than the funeral expenses.**
- III. List of the names and addresses for the decedent's next of kin (R.C. 2105.06).
- IV. Original copy of any last will and testament for the decedent.
- V. List of the names and addresses for the persons listed to receive property in the decedent's last will and testament.
- VI. As to property that is passing through probate:
  - A. Real Estate:
    - i. Copy of the deed to the real property.
    - ii. Value for the real property from the County Auditor  
In Montgomery County the website for the Auditor is [www.mcrealestate.org/](http://www.mcrealestate.org/)
  - B. Vehicles/Boats:
    - i. Copy of the title for the automobile/boat/truck/motorcycle or trailer.
    - ii. Book value for the vehicle/boat from NADA – [www.nada.com](http://www.nada.com)  
The average trade in value is used.
  - C. Bank Accounts:
    - i. Copy of last account statement. Account numbers should not be listed on probate forms.
  - D. Household goods:
    - i. List of household goods valued at rummage sale prices.
  - E. Antiques:
    - i. Itemized list of items with statement from a recent appraisal.
  - F. Stocks/Bonds:
    - i. If over the counter stocks you need a description of the type and number of shares and a value at the closing price for the date of death.
    - ii. Stock for closely held corporations must be valued by a court approved appraiser.
  - G. US Savings Bonds: List of bond and for the value for Series E or EE – contact a bank for current values. Series H are listed at face value