

**PROBATE COURT OF FRANKLIN COUNTY, OHIO**  
**JEFFREY D. MACKEY, JUDGE**

IN THE MATTER OF THE

- WRONGFUL DEATH TRUST
- INTER VIVOS TRUST
- R.C. 2111.182 MINOR'S TRUST
- SPECIAL NEEDS TRUST
- TESTAMENTARY TRUST

OF \_\_\_\_\_ DECEASED/GRANTOR

FBO \_\_\_\_\_ BENEFICIARY

CASE NO. \_\_\_\_\_

**FIDUCIARY'S ACCEPTANCE TRUSTEE**  
[R.C. 2109.02]

I hereby accept the duties which are required of 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 located 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 a 1st account within one (1) year following my appointment or such time as ordered by the Court; File additional accounts on at least an annual basis;
7. Timely file all tax documents as required by law;
8. 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;
9. Obey all Orders of the Court; and,
10. Immediately notify the Probate Court if I change my address.

I acknowledge that I am subject to removal as 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.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Trustee