



Robert G. Montgomery, Judge

Franklin County Probate Court

373 SOUTH HIGH STREET, 22ND FLOOR, COLUMBUS, OHIO 43215-6311
probate.franklincountyohio.gov
Phone: (614) 525-3894
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June 8, 2018

Dear Account Fiduciary or Custodian,

The Probate Court acts as the superior guardian of wards (including minors) who are subject to its jurisdiction. All guardians who are subject to the jurisdiction of this Court shall obey all orders of the Court that concern their wards or guardianships. The powers of the Probate Court shall be exercised in the best interests of the ward.

Parents have financial responsibility concerning their minor children's care, medical and dental expenses, education and general support. This Court typically does not approve expenditures for cars to minors, or for other expenses that the Court deems to be a primary parental responsibility.

This letter outlines the procedure if you wish to have the Court consider an expenditure from a custodial account.

Please read these instructions carefully, as you will be required to follow this procedure for all future requests to expend funds.

- You must submit an Application for Authority to Expend Funds From Custodial Account - This **must** include an itemized list of each expense which shall include a detailed description of the item/service to be purchased. For example, an invoice from the seller showing the cost, and a complete statement as to why the ward's funds should be used for the purchase. You will be required to submit all documentation which supports your request at the time of filing.

If you are seeking reimbursement for a cost already incurred, which is not hereby guaranteed, please provide all applicable receipts.

Applications without sufficient documentation may be denied.

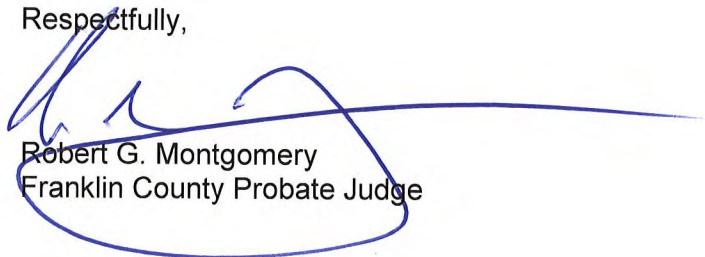
- Form **15.7A**: *Application for Authority to Expend Funds From Custodial Account*, to be used in all minor settlement, guardianship and dispense with guardianship cases; and Form **25.9**: *Application for Authority to Expend Funds*, to be used in all trust cases, can be found on the Court's website at: <http://www.franklincountyohio.gov/probate/forms.cfm>.
- A completed Form PC-15.7: *Household Resource Worksheet* must be filed with every expenditure request involving a minor.

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- Payment is due at the time application is filed. - The cost is \$16.00. This charge includes the filing fee for an application of up to four pages, the entry approving or denying the application, and a certified copy of the entry. If your Application and supporting documents exceed four pages, you will be required to pay an additional \$1.00 per page for each page after the first four pages. Payment may be made only via cash, money order or credit card. **No personal checks are accepted.** A copy of the entry will be mailed to the address of record for the applicant. You should verify that the Court has your current address.
- Requests for expenditures WILL NOT be reviewed at the Magistrate duty desk.
- Applications to expend funds will be reviewed by a committee on a weekly basis. For your planning purposes, please allow two to three weeks for the Court to make a final determination on your Application.
- Applications shall be submitted initially to the Custodial Department and then to the docketing and cashier clerk. You may submit your application in person between 8:00 a.m. until 4:00 p.m. any Court day, or you may mail in your request at the address listed above: **to the attention of - Custodial Department/ App to Expend.** If you submit your application through the mail, payment must be made by money order.

Thank you for your cooperation in this matter.

Respectfully,



Robert G. Montgomery
Franklin County Probate Judge