

Union County Court of Common Pleas, Probate Division

215 West Fifth Street, Marysville, Ohio 43040

Phone (937) 645-3029 Ext. 3405

Email probatecourt@unioncountyohio.gov

FILING CHECKLIST

Adult Guardianship (Person and Estate)

The following forms need to be completed and a deposit of \$ **200.00** must be paid before opening a case.

Upon proper affidavit and application, costs may be delayed or waived by Court.

- ☐ Application-Appointment of Guardianship of Alleged Incompetent (SPF 17.0)
- ☐ Next of Kin of Proposed Ward (SPF 15.0)
- ☐ Statement of Expert Evaluation (SPF 17.1)
- ☐ Fiduciary's Acceptance (SPF 15.2)
- ☐ Waiver of Notice & Consent (SPF 15.1)
- ☐ Guardians' Bond (SPF 15.3) if applicable, exceptions may apply*
- ☐ Affidavit of Guardian Applicant (SPF 66.05)
- ☐ Statement of Additional Information (Local Form 18/G-1.02)
- ☐ Adult Guardianship Service Information (Local Form 28)
- ☐ Confidential Disclosure of Personal Identifiers (*optional*)
- ☐ BC&I Background Check: BCI Code needed to file for the background check is 2151-412; to schedule with Union County Sheriff's Office, visit: <http://www.unioncountyohio.gov/background-and-web-checks> and have it mailed directly to you before filing it with the Court. Applicants who have not been residents of Ohio for five years and non-Ohio resident applicants shall also complete an FBI Background Check (not required to open case, but due at hearing or filed prior to appointment of guardian).

NOTES

The "alleged incompetent" should appear at the hearing per Local Rule 66.1 (A).

A Probate Court Investigator will be assigned to the case and investigate the proposed ward's circumstances, serve the proposed ward with paperwork and communicate their rights at least seven (7) days prior to the hearing.

Oath of Guardian (SPF 15.9); Judgment Entry (SPF 17.5); Appointment of Guardian of Incompetent Person (SPF 17.5); and Letters of Guardianship (SPF 15.4) signed at hearing.

Guardian is required to complete the six (6) hour Fundamentals of Adult Guardianship course within 6 months of appointment and complete three (3) hours of continuing Adult Guardianship training annually thereafter and file proof of completion with the Court.

*Per Statute 2109.04(A)(3)- Bond should be twice the amount of a personal estate (real estate not included).

Attorneys are required to eFile: eservices.co.union.oh.us/eservices