

Checklist **Minor Trust**

Fees:

Court Costs: \$153.00

* Service Fees for FedEx Commercial Carrier Service will be due at the time of hearing *if applicable*

Requirements

The Minor must be either a resident of Greene County, Ohio, or a beneficiary of a proceeding pending in this Court in which the Court has jurisdiction. The Minor must be entitled to money or property resulting from a settlement or judgment for personal injury or damage to property, inheritance, or other matter. If the Minor already has money or property in a minor guardianship established in this Court, and the applicant wishes to convert the minor guardianship to a minor trust, a different action to convert the minor guardianship to a minor trust must be commenced. See *Converting Minor Guardianship to Minor Trust Checklist*

**Note: All paperwork must be typed. We will not accept handwritten documents.
All filings must be single-sided. We will not accept double-sided originals.
Please do not staple original paperwork. We cannot accept filings with staples.**

Initial filing

- Application to Establish Minor Trust (GC Form 78.4-I)
- Criminal background check of Applicant - See *Local Rule 78.4(M)*
 - o Not required for Applicant that is a natural or adoptive parent of the minor
 - o Must be current within 90 days of filing
- Photocopy of the Minor's birth certificate
- Photocopy of death certificate of any deceased parent or next of kin, *if applicable*
- Proposed* Minor Trust Agreement (GC Form 78.4-J)
 - o The trust agreement must be completed fully, but not signed or executed
- Contact Information Form – Trust Actions (GC Form 78.4-A)
- Self-Representation Acknowledgment (GC Form 75.1) *if applicable*
 - o This form **must** be filed if applicant is not represented by an attorney.
- Entry Setting Hearing on Application to Establish Minor Trust (GC Form 78.4-K)
- Waiver of Notice and Consent to Application to Establish Minor Trust (GC Form 78.4-L) *if applicable*
- Notice of Hearing on Application to Establish Minor Trust (GC Form 78.4-M) *if applicable*
- Judgment Entry Establishing Minor Trust (GC Form 78.4-N)
- Letters of Authority of Trustee of Minor Trust (GC Form 78.4-O)
- Trustee's Bond (GC Form 105.1-F)
 - o Bond commitment may be provided with application

OR

- Application to Dispense with Trustee's Bond (GC Form 75.2-E)

AND

- Entry Regarding Trustee's Bond (GC Form 75.2-F)

See *Local Rules 75.2 and 78.4(C)* on bond requirements

Later Filings

- Trustee's Inventory (GC Form 105.1-G)
 - o Due 3 months following the date of Appointment of Trustee

- Trustee's Account (GC Form 105.1-H)
 - Due 1 year following Appointment of Trustee, and then every other year thereafter.
 - See Greene County Local Rule 77 for citations and sanctions of late filings
- OR
- Bank Statements or Investment Statements
 - The account number must be redacted to last four digits
 - See Local Rule 78.4(l) regarding statements in lieu of accounts
- Application for Authority to Expend Funds (GC Form 78.4-B)