

Checklist

Converting a Minor Guardianship to a 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 have an established guardianship of the minor's estate, or be simultaneously filing to establish a guardianship of a minor's estate, in Greene County Probate Court. A guardian, parent or legal custodian seeks to convert the minor guardianship into a minor trust to maintain the assets until the minor turns 25. If the Minor is 14 year or older, the Court may require a Guardian ad Litem be appointed before approving a conversion of a minor guardianship to a minor trust. (see Local Rule 66.2(H)).

**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 Convert Minor Guardianship to Minor Trust (GC Form 66.2-D)
- Criminal background check of Applicant - *See Local Rule 78.4(M)*
 - o Not required for Applicant that is the current Guardian of the minor's estate or that is a natural or adoptive parent of the minor (must be current within 90 days of filing)
- proposed* Minor Trust Agreement (GC Form 78.4-J)
 - o The trust agreement must be completed fully, but not signed or executed
- 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 Convert Minor Guardianship to Minor Trust (GC Form 66.2-E)
- Waiver of Notice and Consent to Application to Convert Minor Guardianship to Minor Trust (GC Form 66.2-F) *if applicable*
- Notice of Hearing of Application to Convert Minor Guardianship to Minor Trust (GC Form 66.2-G) *if applicable*
- Judgment Entry Converting Minor Guardianship to Minor Trust (GC Form 66.2-H)
- Letters of Trustee for Minor Trust (GC Form 78.4-O)
- Contact Information Form – Trust Actions (GC Form 78.4-A)
- Application to Convert Guardian's Bond to Trustee's Bond (GC Form 66.2- J) *if applicable*

AND

- Judgment Entry Ordering Conversion of Guardian's Bond to Trustee's Bond (GC Form 66.2-K) *if applicable*

OR

- Trustee's Bond (GC Form 105.1-F) - *See Local Rules 75.2 and 78.4(C) on bond requirements*
- Entry Appointing Guardian ad Litem (GC Form 66.2-I) *if applicable* - *See Local Rule 66.2(H)*
 - o The Court will appoint a Guardian ad Litem after filing

Later Filings

- Final Guardian's Account
- Proof of conversion from Guardian's Bond to Trustee's Bond

See Checklist for Minor Trust for additional later filings