

## **Checklist**

### **Guardianship of Incompetent Adult**

#### Filing Fees:

- **Initial Guardianship of Adult - \$276.00**  
**(Includes \$75.00 investigation fee and 5 certified Letters of Guardianship)**
- **Appointment of Successor Guardian - \$128.00 for appointment of a successor guardian**  
**(Includes \$75.00 investigation fee and 5 certified Letters of Guardianship)**

\*Add \$5.00 if filing a Guardian's Bond, Bond Commitment or Application to Dispense with Guardian's Bond

\*Add \$5.00 if filing any Motion or Application not otherwise specified

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

#### Requirements

The alleged incompetent adult must be a current resident of Greene County, Ohio. At the hearing on the application for appointment of guardian, the applicant bears the burden of proving, by clear and convincing evidence both of the following: (1) the ward's mental incompetence; and (2) that no less restrictive alternative exists to the proposed guardianship (Greene County Local Rule 66.3(B)).

For more information on Guardianship requirements, please refer to Chapter 2111 of the Ohio Revised Code, and Greene County Local Rule 66.1

**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 for Appointment of Guardian of Incompetent (Form 17.0)
  - Criminal background check of the applicant (see Local Rule 66.1 for requirements)  
(must be current within 90 days of filing)
  - Copies of proposed ward's Powers of Attorney or Health Care Powers of Attorney currently in force *if applicable*
  - Copies of proposed ward's will or trust *if applicable*
  - Bond commitment (See Local Rule 75.2(C)) *if applicable*
- Ward's Supplement (GC Form 66.1-A)
- Applicant's Supplement (GC Form 66.1-B)
- Statement of Expert Evaluation (Form 17.1) (must be current within 90 days of filing)
- Next of Kin of Proposed Ward (Form 15.0)
- Contact Information Form (GC Form 75.3-A)
- Self-Representation Acknowledgment (GC Form 75.1) *if applicable*
  - This form **must** be filed if applicant is not represented by an attorney.
- Judgment Entry Setting Hearing on Application for Appointment of Guardian (Form 15.01)
- Notice to Prospective Ward of Application and Hearing (Form 17.3)
  - If the prospective ward is in a facility, the name of the facility **must** be on the Notice
- Waiver of Notice and Consent (Form 15.1)
  - All parties listed on the Next of Kin of Proposed Ward (Form 15.0), who are Ohio residents, must either sign this Consent or be served notice (see Form 17.4)
- Notice of Hearing for Appointment of Guardian of Alleged Incompetent (Form 17.4) *if applicable*
  - All parties listed on the Next of Kin of Proposed Ward (Form 15.0), who are Ohio residents, must either Consent (see Form 15.1) or be served this notice.
- Judgment Entry Appointment of Guardian of Alleged Incompetent Person (Form 17.5)
- Oath of Guardian (Form 15.9)

- Letters of Guardianship (Form 15.4)
- Fiduciary's Acceptance (Form 15.2)

Later Filings

- Guardian's Bond (Form 15.3) *If applicable*
- Guardian's Inventory (Form 15.5) *If applicable*
  - Due 3 months following the date of Appointment of Guardian
- Guardian's Account (Form 15.8) *If applicable*
  - Due 1 year following Appointment of Guardian, and then every other year thereafter.
  - See Greene County Local Rule 77 for citations and sanctions of late filings
- Guardian's Report (Form 17.7) Due every other year, no later than the anniversary date of Appointment of Guardian
  - A Guardian's Plan – Person (Form 27.7) and/or Guardian's Plan – Estate (Form 27.8) must be filed with each Guardian's Report
  - Updated Statement of Expert Evaluation (Form 17.1) must be filed ONLY if the Court ordered it pursuant to the Supplemental Judgment Entry issued at the time of appointment, or pursuant to another order
    - must be current within 90 days of filing
  - See Greene County Local Rule 77 for citations and sanctions of late filings
- Ward's Last Will and Testament
  - Pursuant to Greene County Local Rule 66.3, the proposed ward's original Last Will and Testament is required to be deposited with the Court no later than the earlier of: (1) the date of filing the guardian's inventory; or (2) 30 calendar days after discovery of the Ward's will.
- Application to Release Funds to Guardian (Form 15.6) *If applicable*
- Application for Authority to Expend Funds (Form 15.7) *If applicable*