

**PROBATE COURT OF PORTAGE COUNTY, OHIO**  
**PATRICIA J. SMITH, JUDGE**

**IN THE MATTER OF** \_\_\_\_\_  
**CASE NO.** \_\_\_\_\_

**FIDUCIARY'S ACCEPTANCE TRUSTEE**

[R.C. 2109.02]

I hereby accept the duties which are required of me by law, and such additional duties as are ordered by the Court. As Trustee of this estate I will:

1. Make and file an inventory of the real and personal assets of the trust within 3 months after appointment, or such time as extended by the Court;
2. Deposit funds which come into my hands in a lawful depository located within this state: The trust checking account must provide statements showing all cancelled checks as these checks must be displayed when filing accounts;
3. Keep trust funds in a separate trust account at all time during the administration of the trust;
4. Invest all funds in a lawful manner;
5. Timely pay bond premium, if any;
6. Make and file a 1<sup>st</sup> account within one (1) year following my appointment; File additional accounts on at least a biennial basis from the date of appointment or such time as ordered by the Court;
7. Timely file all tax documents as required by law;
8. Submit all filings with original signatures of all fiduciaries;
9. Obey all Orders of the court; and
10. Immediately notify the Probate Court if I change my address.

I acknowledge that I am subject to removal as Trustee if I fail to perform my fiduciary duties.

I acknowledge that I am subject to possible civil and criminal penalties for improper conversion of the property which I hold as fiduciary.

**NOTE:** ORC 2109.02 states that every fiduciary, before entering into the execution of a trust, shall receive letters of appointment from a Probate Court having jurisdiction of the subject matter of the trust. The duties of a fiduciary shall be those required by law, and such additional duties as the Court orders. Letters of appointment shall not issue until a fiduciary has executed a written acceptance of those duties, acknowledging the possibility of removal for failure to perform those duties, and further being subject to possible penalties for conversion of property held as a fiduciary. The written acceptance of duties may be filed with the application for appointment.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Trustee