

Supplemental Checklist
Inventory and Transfers
Full Administration

Inventory

Inventory is due 3 months after the date of appointment. See Rules of Superintendence Rule 77 and Greene County Local Rules 77.1 – 77.4 for specific information regarding Citations for late filings.

The filing fee for the Inventory was paid in the initial estate administration cost. *Note: If you have to amend an Inventory, the filing fee for an Amended Inventory is \$10.00*

Required Documents

- Inventory and Appraisal (Form 6.0)
- Schedule of Assets (Form 6.1)
 - See Greene County Local Rule 78.2(D) for requirements

Note: If the value of an asset is not readily ascertainable see Greene County Local Rule 61.1 and 61.2 for requirements. If the asset is a business interest, see Local Rule 61.3 for requirements on business interests.

If business interest is listed:

- The business interest must be described in the Schedule of Assets with the following items:
 - Name of business
 - Type of business
 - Decedent's ownership interest in business or number of shares owned (stated by percentage)
- The business must be appraised, unless it is a sole proprietorship
- Appointment of Appraiser (Form 3.0) *Filed prior to or simultaneously with Inventory*
 - Appraiser's qualifications must be attached to the Appointment of Appraiser (if Appraiser is not a Certified Public Accountant)
 - See Greene County Local Rule 61.3 for Appraisal of Business Interests

If automobile is listed

- Proof of valuation is required to be filed simultaneously with the inventory
 - Either:
 - Print-out showing the value (from Kelly Blue Book, NADA, etc.)
 - OR
 - Appointment of Appraiser (Form 3.0)
 - The appraiser needs to sign the Appraiser's Certificate on page 1 of the Inventory, or you may attach the appraiser's letter to the inventory. (we do not want the full appraisal filed)
 - See Greene County Local Rule 61.1 for Appraiser requirements

If real estate is listed:

One of the following must be filed with the Inventory:

- Tax Valuation from Auditor
 - See Greene County Local Rule 61.2 for more information about Alternative Valuation Method.
- OR
- Appointment of Appraiser (Form 3.0) *Filed prior to or simultaneously with Inventory*
 - Note: If property was appraised, the appraiser needs to sign the Appraiser's Certificate on page 1 of the Inventory, or you may attach the appraiser's letter to the inventory. (we do not want the full appraisal filed)
 - See Greene County Local Rule 61.1 for Appraiser requirements

Greene County Probate Court **does not** require the following, but will accept the following for filing:

- Waiver of Notice of Hearing on Inventory (Form 6.2)
- Notice of Hearing on Inventory (Form 6.3)
- Green cards showing proof of service

Transfers of Property

Filing fee: One Application for Certificate of Transfer is included in the initial costs for filing.

\$8.00 for additional Application for Certificate of Transfer

\$1.00 for additional Certificates of Transfer on the same application

Real Estate Transfer *If applicable*

- Application for Certificate of Transfer (Form 12.0)
- Certificate of Transfer (Form 12.1)
 - If property is located in Greene County, the legal description must have the Auditor's approval stamp on the legal description before being filed in Probate Court.
- For dates of death prior to January 1, 2013, a form ET 22 is require

Motor Vehicle Transfer *If applicable*

Filing fee: \$6.00 each

- Application for Transfer of Motor Vehicle (GC Form 78.2-A)
 - Be sure to include the make, model, year and Vehicle Identification Number (VIN) on any type of motor vehicles. The title bureau cannot accept paperwork without this information.
 - If the distribution is not consistent with the Will or laws of intestate succession, then you must file the Consent to Alternate Distribution of Tangible Personal Property (GC Form 78.2-C).
- Application for Transfer of RV, Boat, Trailer (GC Form 78.2-B)
 - Be sure to include the make, model, year and Vehicle Identification Number (VIN) on any type of motor vehicles, including mobile homes. Note: for boats it will be a "Haul Identification Number (HIN) instead of a VIN. The title bureau cannot accept paperwork without this information.
 - If the distribution is not consistent with the Will or laws of intestate succession, then you must file the Consent to Alternate Distribution of Tangible Personal Property (GC Form 78.2-C).

Note: A Motor Vehicle Transfer form is not required in all estate cases. See Local Rule 78.2 for more information.