

Checklist

Terminating a Testamentary Trust

Fees:

Court Costs: \$10.00

Requirements

A testamentary trust action must have been established in this Court, with the Court having continuing jurisdiction over the trust. The reasons for termination must comply within the standards set forth in R.C. §2109.62. This action cannot be used to terminate a revocable living trust, or other trust described in Chapter 5801 of the Ohio Revised Code.

**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

- Self-Representation Acknowledgment (GC Form 75.1) *if applicable*
 - This form **must** be filed if applicant is not represented by an attorney.
- Motion to Terminate Testamentary Trust (GC Form 78.4-D)
 - The Trustee must serve a copy of the Motion on all parties who have not waived, by **ordinary mail**.
- copy of Decedent's Will establishing the trust agreement*
- Waiver of Notice and Consent to Termination of Testamentary Trust (GC Form 78.4-E) *if applicable*
 - All parties who sign the Waiver, **do not** have to be served with Notice of Hearing
- Notice of Hearing on Motion to Terminate Testamentary Trust (GC Form 78.4-F) *if applicable*
- Entry Setting Hearing on Motion to Terminate Testamentary Trust (GC Form 78.4-G)
- Judgment Entry Terminating Testamentary Trust (GC Form 78.4-H)

Later Filings

- Final Trustee's Account