**GUARDIANSHIP OF** _____

**CASE NO.** _____

# APPLICATION TO DEPOSIT PERSONAL PROPERTY IN LIEU OF BOND AND FOR AUTHORITY TO INVEST FUNDS

Now comes _____, the duly appointed, and acting guardian of the within estate, and represents to the Court that the value of the estate or fund is such that it is deemed inexpedient to require security in the full amount prescribed by law.

Your applicant further represents to the Court that there are estate assets as follows: _____

_____

_____

which the guardian desires to deposit with _____ , an institution authorized as:

☐ a bank
☐ a building and loan association
☐ a savings and loan association
☐ a trust company

under the laws of:

☐ the State of Ohio
☐ the United States of America

and thereby qualified to serve as depository under the provisions of R.C. 2109.13.

Your applicant requests that the Court direct the deposit of the above-described assets, and that said institution acknowledge the deposit by filing a written verification with the Court that such assets are held by it subject to the further order of this Court. Your applicant further requests the Court to fix the amount of bond, if any, with respect to the value of the remainder of the estate.

Your applicant further states that it is in the best interests of the ward's estate to order such deposit according to law with such institution. The estate of my ward presently consists of the following property:

(a) Real estate presently valued at                    $ _____

(b) Personal property presently valued at          $ _____

(c) Personal property to depository                   $ _____

(d) Personal property with fiduciary                  $ _____

Your applicant further states that it is in the best interest of the ward's estate to grant authority to the guardian to instruct such depository to invest and reinvest the personal property deposited pursuant hereto in accordance with the investment powers and limitations set forth in R.C. 2109.37 and 2109.371 , without obtaining additional orders of the Court authorizing specific future purchases and sales,  and to authorize the depository to carry out such investment instructions.

**WHEREFORE,** your applicant requests that this Court grant an order setting the amount of bond at $ _____ ; authorize and direct the deposit of the assets herein described with the above financial institution; authorize the depository to invest and reinvest the personal property deposited hereunder pursuant to R.C. 2109.37  and  2109.371 , without  obtaining  additional  orders  of  the  Court;  and authorize the depository to carry out such investment instructions.

| | |
|---|---|
| _____ | _____ |
| Attorney for Guardian | Guardian |
| _____ | _____ |
| Typed or  Printed Name | Typed or  Printed Name |
| _____ | _____ |
| Address | Address |
| _____ | _____ |
| _____ | _____ |
| Phone Number (include area code) | Phone Number (include area code) |