

Ohio Real Estate Transfer on Death Checklist

At the end of 2009 the laws regarding Transfer On Death (TOD) real estate deeds changed in the State of Ohio. TOD is a way to attach beneficiaries to your real estate who will inherit the property upon your death while allowing the property to avoid probate. Please use this checklist to see if it would be beneficial to review the deed on your home, or any other real estate you own in Ohio.

1. Do you have your real estate registered joint tenancy with survivorship, and therefore were precluded from naming beneficiaries?
 Yes No
2. If you have a TOD deed, would you like to have the ability to have the beneficiaries inherit unequal shares, but could not do so under the old law?
 Yes No
3. Would you like your TOD beneficiaries to have survivorship rights?
 Yes No
4. Is your real estate registered with a deed by entireties?
 Yes No
5. Have you recently had a major event in your life and need to change the beneficiaries on your deed?
 Yes No

If you answered "Yes" to any of the above questions, you may want to review the titling on your real estate. Contact the Lineweaver WealthWatch Center to further discuss your estate planning needs.

Information provided by Attorney Jack Koscianski who is a member of the team of professionals at the Lineweaver WealthWatch Center. The Lineweaver WealthWatch Center is a comprehensive resource center that brings independent financial, tax, legal and insurance professionals together. Working together they can integrate and fully coordinate a plan to accomplish all your goals and objectives. Attorney Jack Koscianski can be reached through our office at (216) 867-3770.



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