

The Court requires that this form shall be used in all cases. Counsel is required to supply all of the information requested in this form. Note particularly marginal instructions.

**IN THE COURT OF COMMON PLEAS OF DELAWARE COUNTY, PENNSYLVANIA  
ORPHANS' COURT DIVISION**

Estate of

Deceased

The Petition of

(Name of Petitioner(s))

respectfully represents:

(a) The decedent died \_\_\_\_\_  
(Date)

Strike out the inapplicable word or words.

having made his/her last Will/Will and Codicil(s) duly probated \_\_\_\_\_, on which the present letters  
(Date)

State whether a husband or wife survived; and if so, his or her name and residence; whether he or she has elected to take under or against the will, and if so, whether the elections have been duly recorded and filed, and furnish a copy; and whether or not the decedent left issue or adopted children, and their names and residences, when material.

were granted \_\_\_\_\_, and leaving to survive h  
(Date)

In cases of partial intestacy, state the names and residences of the heirs and next of kin, their relationship to the decedent, and where applicable, the names of their parents, thereby disclosing the relationships and interests derived therefrom.

(b) The names and residences of all beneficiaries, their relationship to the decedent and the amounts, nature, and character of their interests (noting such devises and bequests as having been revoked, adeemed, lapsed, assigned, or disclaimed, and the supporting information relative thereto) are as follows:

Name and Residence	Relationship	Amount, Nature and Character of Interest
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State exceptions, if any, as to those parties in interest who are under legal disability, specifying the reason therefor, and the names and residences of their guardians or representatives and how appointed (specifying the court term and number, where applicable); the dates of the deaths of any of the beneficiaries who are deceased, the names and residences of their personal representatives and the dates and places of the grant of their letters, or the names and residences of their issue, when material. If there are no exceptions, insert the word "none".

All of said parties in interest are living, of age, and sui juris except:

State method, date and exceptions, if any. In those instances where notice has been given, a copy of said notice, as well as the names and addresses of the parties notified, shall be appended to the Petition for Adjudication. In those instances where notice is yet to be given, a copy of said notice as well as the names and addresses of the parties notified, shall be filed with the Court at the time and place of audit together with a certificate of notice executed by counsel.

Strike out subsection (1) or (2), whichever is inapplicable.

(c) All parties in interest, including unpaid creditors and claimants, and any parties with arguable interests under Delaware County O.C.D. Rule 6.9.2(c);

(1) Have had notice of the filing of the account, the Petition for Adjudication, and of the time and place of audit by

(2) Shall be given notice of the filing of the account, the Petition for Adjudication, and of the time and place of audit as required by the Rules of Court.

(NOTE: Delaware County O.C.D. Rule 6.9.2(c) provides as follows: "(c) In those instances where there exists any fairly disputable issue or question, including a question of interpretation, known to or reasonably ascertainable by the accountant or his counsel, the aforesaid written notice to all parties in interest affected thereby shall state the same, the position and/or conclusion of the accountant with regard thereto, if any, and shall include a copy of the instrument or material parts thereof containing any provision which forms the basis of the dispute or question and a statement that if the person notified does not agree with the accountant's position and/or conclusion, he must appear at the audit in person or by counsel to present his contention, under penalty for failure to appear that the court will assume that he agrees with the accountant's position and/or conclusion.")

Insert names of any after-born or adopted children and dates of birth or adoption. In either case, state the names and residences of the spouse and children.

(d) The decedent did/did not marry after the execution of the will and codicils (if any) and there were \_\_\_\_\_ children born to or adopted by the decedent thereafter.

Strike out the inapplicable words.

(e) The estate is/is not subject to Pennsylvania inheritance or estate taxes, and such tax has/has not been paid.

If too many for the space, annex a list thereof; if no such claims, insert the word "none".

(f) The names and addresses of unpaid creditors from whom the accountant has received written notice, the amounts of their claims, and whether or not such claims are admitted to be correct, as well as the names of any other unpaid claimants of whom the accountant has notice or knowledge, are as follows:

Here insert or attach as an exhibit a copy of the parts of the will and codicil(s) which require interpretation by the Court; if any; a reference to all questions requiring adjudication; a statement of any material facts not already given; and the position and/or conclusion of the accountant, if any. If none, insert the word "none". If any share has been assigned or disclaimed or attached, state the pertinent facts and attach copies of pertinent documents. Attach an addendum page if additional space is necessary.

(g)

If so, state the present status thereof and the court term and number thereof, if any.

(h) The decedent was \_\_\_\_\_ at the time of death, a fiduciary in another estate which has not been terminated by a final adjudication or in writing by receipt and release, agreement or other form of written release.

If none, insert the word "none". With the exception of filing fees and credits of a minor nature, credits not set forth herein shall not be considered or approved by the Court, including, but not limited to commissions and/or fees of fiduciaries or their counsel, unless written notice thereof has been given to all parties in interest at least 10 days prior to the date of audit, in which event the same shall be set forth on the appearance slip of the attorney for the accountant. Further, in such event, copies of the aforesaid written notice shall be submitted with the appearance slip of the attorney for the accountant.

(i) An itemization of additional charges and/or credits sought to be included in the adjudication for receipts or disbursements not set forth in the account is as follows:

Strike out the inapplicable word or words. If a reserve is requested, state the amount and purpose thereof.

(j) A reserve is/is not requested.

If none, insert the word "none". If pertinent, list and attach hereto such items as a legal description of any real estate to be awarded as part of the adjudication, copies of assignments and/or disclaimers, copies of trust documents (in cases of "pour over" wills), etc. Do *not* list items 1, 2 and 3 set forth on the backer hereof.

(k) The following additional documents or instruments are submitted herewith:

**WHEREFORE**, your Petitioner(s) ask(s) that distribution be awarded to the persons thereunto entitled and suggest(s) that the distributive shares of principal and income are as follows (residuary shares being stated in proportions, but not amounts):

And your petitioner(s) will, etc.

\_\_\_\_\_  
(Signature of Petitioner(s))

COMMONWEALTH OF PENNSYLVANIA :  
: SS  
COUNTY OF DELAWARE :

\_\_\_\_\_, the within Petitioner(s), being duly sworn/affirmed according to law, depose(s) and say(s) that the facts set forth in the foregoing Petition which are within the personal knowledge of the Petitioner(s) are true, and as to facts based on the information of others, the Petitioner(s), after diligent inquiry believe(s) them to be true.

\_\_\_\_\_  
Signature(s) of individual Petitioner(s)

Sworn to and subscribed before me this

\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

\_\_\_\_\_  
Notary Public

COMMONWEALTH OF PENNSYLVANIA :  
: SS  
COUNTY OF DELAWARE :

\_\_\_\_\_, being duly sworn/affirmed, according to law, deposes and says that he/she is the \_\_\_\_\_, of the Corporate Petitioner, and that the facts set forth in the foregoing Petition which are within the personal knowledge of the Deponent are true, and as to facts based on the information of others, the Deponent, after diligent inquiry believe(s) them to be true.

\_\_\_\_\_  
Signature of Officer of Corporate Petitioner

Sworn to and subscribed before me this

\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

\_\_\_\_\_  
Notary Public