

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

Estate of _____ An Incapacitated Person

Sur Account of _____, Guardian

The Petition of _____

(Name of Petitioner(s))

respectfully represents:

(a)

was adjudicated an incapacitated Person by Decree of the Court of Common Pleas, Orphans' Court Division of _____ County, per _____ J, on _____, and _____

was appointed Guardian of the said Incapacitated Person's estate.

(b) The reason or purpose of filing the account is _____

If applicable, state the identity of any previously appointed guardians.

If applicable, state the date of the Incapacitated Person's death whether the Incapacitated Person died testate or intestate, the names and residence of the late incapacitated person's personal representative, the type of letters granted to the personal representative, and the date and place granted, specifying the will or administration number and the name and address of the personal representative's attorney. If the incapacitated person has been adjudged to have capacity, state the date of the decree. If the account is filed because of death, resignation, etc., of the guardian, or for any reason other than noted, state the address of the incapacitated person.

State method, date and exceptions, if any.

(c) All parties in interest, excepting the incapacitated person (or the late incapacitated person), 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.

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.

(Attach an addendum page if additional space is necessary)

(3) The names, residences and relationship to the Incapacitated Person of all parties in interest are as follows:

Names and Residence

Relationship

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".

(d) All of the said parties in interest, other than the Incapacitated Person (or the late Incapacitated Person), are living, of age, and sui juris, except:

(e)

Here insert a reference to all questions requiring adjudication, a statement of material facts not already given and the position and/or conclusion of the accountant, if any. If none, insert the word "none". (Attach an addendum page if additional space is necessary.)

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:

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, and further, in such event, copies of the aforesaid written notice shall be submitted with the appearance slip of the attorney for the accountant.

(g) 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:

If none, insert the word "None". If pertinent, list and attach hereto such items as a copy of the Letters Testamentary or Letters of Administration, or a short certificate thereof, a legal description of any real estate to be awarded as part of the adjudication, and copies of any other pertinent documents or instruments.

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

WHEREFORE, your Petitioner(s) ask(s) that distribution of principal and income be awarded as follows:

(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

Bureau File No. 23-

Orphans' Court No. _____ of

**IN THE
COURT OF COMMON PLEAS
OF
DELAWARE COUNTY, PENNA
Orphans' Court Division**

Estate of

An Incapacitated Person

PETITION FOR ADJUDICATION

Filed

Attest:

Clerk

COUNSEL FOR ACCOUNTANT SHALL

SUBMIT HERewith:

1. Any additional documents or instruments which may be pertinent as required by the Delaware County O.C.D. Rules (including those set forth in the marginal notes).

NOTE: An appearance slip for those represented shall be filed with the Court at the time of audit.