

The Court requires that this form shall be used in all cases. Counsel are 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

NO. of 19

Estate of , An Incompetent

Sur Account of , Guardian

The petition of (Name of Petitioner(s))

respectfully represents:

(a)

was adjudicated an Incompetent, by Decree of the Court of Common Pleas, Orphans' Court Division, of County, per J.,

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

on , 19 , and

was appointed Guardian of the said In-

competent's estate.

If applicable, state the date of the incompetent's death, whether the incompetent died testate or intestate, the names and residence of the late incompetent'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 incompetent has been adjudged competent, 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 incompetent.

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

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 statement of proposed distribution. 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, excepting the incompetent (or the late incompetent), 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 statement of proposed distribution, and of the time and place of audit by

(2) Shall be given notice of the filing of the account, the statement of proposed distribution, and of the time and place of audit as required by the Rules of Court.

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

Name 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 committees 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 said parties in interest, other than the incompetent (or the late incompetent), are living, of age, and sui juris except:

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".

(e)

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))



Bureau File No. 23-8

Orphans' Court No.                      of 19

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

No.                      of 19

Estate of

An Incompetent.

**STATEMENT OF  
PROPOSED DISTRIBUTION**

Filed    19

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.

Attorney.