

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 _____ No: _____ of _____ Deceased

Sur trust for

The Petition of

(Name of Petitioner(s))

respectfully represents:

Strike out the inapplicable word or words

(a) The decedent died _____
(Date of Death)

having made his/her Will/Will and Codicil(s) duly
probated

(Date)

Set forth in summary form, all the pertinent provisions of the trust and a reference to any prior adjudication, if any, including the Court term and number where applicable.

The trust arises under the will as follows:

Attach an addendum page if additional space is necessary.

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

The names and residences of all persons having any claim or interest, vested or contingent, in the trust, and the nature of their claims or interests, are as follows:

Attach an addendum page if additional space is necessary.

Name and Residence	Nature of Claim or Interest	Vested or Contingent
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All of said parties in interest are living, of age, and sui juris, except:

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 personal 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".

(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.

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 applicable.

(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.”)

Strike the inapplicable words.

(d) The trust is/was is not/was not subject to Pennsylvania inheritance or estate taxes.

If subject thereto, 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”.

(e) The names and address 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.

(f)

If none, insert the word "none". With the exceptions 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, commission 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 legal description of any real estate to be awarded as part of the adjudication, copies of assignments and/or disclaimers, etc.

(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:

And your Petitioner(s) will ever, 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

Bureau File No. 23-

Orphans' Court No. of

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

Estate of

Deceased

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.