

The Court requires that this form shall be used at all times. Counsel are required to apply 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**

In re Trust of

Settlor

Under Deed of Trust dated

The Petition of

(Name of Petitioner(s))

respectfully represents:

State the residence in the case of a corporate trustee, or the principal office of the accountant(s) and the facts giving the Court's jurisdiction. If no other Court has heretofore taken jurisdiction, insert the word "none".

(a) The residence or principal office of the accountant(s)

No other court has heretofore taken jurisdiction of any matter relating to this trust except:

State the date and manner of appointment.

(b) The accountant(s) appointed
Trustee

on (Date) , by virtue of

Strike the inapplicable words and statements. If the trust document was previously recorded, state the date and place of recording.

(c) The subject Agreement/Deed of Trust will be recorded in connection with the subject proceedings.

The subject Agreement/Deed of Trust, as amended has been previously recorded on _____ at the office of _____ County of _____

Set forth a brief summary of the relevant provisions of the trust; make reference to prior adjudication(s) if any, in which the fund or part thereof was awarded to the present accountant(s) or his/her predecessor for the purposes herein set forth, specifying the date, court and term of such prior adjudication and state whether the trust has terminated in whole or in part, and the reasons therefor.

(d) The Trust arises as follows:

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

Attach an addendum page if additional space is necessary.

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:

Name and Residence	Nature of Claim Or Interest	Vested or Contingent
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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 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".

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

(e) 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 out the inapplicable words

(f) The trust is/was is not/was not subject to Pennsylvania Inheritance or estate taxes,

If subject hereto, 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".

(g) 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 trust instrument(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 thereof.

(h)

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 name shall be set forth on the appearance slip of the attorney for the accountant, and further, in each 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:

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. Do not list items 1 and 2 set forth on the backer hereof.

(j) 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, 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

