

Court of Common Pleas of Bucks County, Pennsylvania Orphans' Court Division

TRUST OF.....

Sur trust for.....

Petition for Adjudication

In.....Account of.....

Audit List of, 19.....

The Petition of.....

.....respectfully represents that:

1. Settlor executed a.....of trust
dated.....19....., wherein.....he appointed as trustee.....

of....., who.....

2. The situs of the trust is in Bucks County, and no other Court has heretofore taken jurisdiction of any matter relating to the trust.

3. The trust arises as follows:

State whether agreement, declaration, or deed; and whether revocable or irrevocable.

State address of trustee. State whether original trustee is accountant here, or whether he died, or resigned and accountant appointed substituted trustee, stating how and when.

Quote relevant provisions of instrument creating trust. If lengthy, a summarization will suffice.

State what prior accounts of same trust were filed, and dates of adjudications.

4.

If none, so state.

State names of relevant parties with dates of death, majority, etc., as material.

5. The account is filed because

6. The names and addresses of all persons having an interest in the trust, vested or contingent, the nature of their interests and how derived, are as follows:

State exceptions if any, giving names, dates of death, and names of executor, administrator, or issue, as material; also names of guardians and trustees, if any, and how appointed.

7. All said parties in interest are living, of age, and sui juris

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State exceptions, if any, also how and when notice given. Submit copies of notices. See also Pa. O.C. Rules 6.3, 6.7 and 6.8; and Bucks O.C. Rules 5.4A and 6.3A.

8. Written notice of the filing of the account and of the time and place of the call thereof for audit was given to all persons to whom notice is required to be given by Pa. O.C. Rule 6.3, by

State facts as to Pa. Transfer Inheritance Tax and Pa. Additional Estate Tax, and

9.

Submit certificate or receipt of Register of Wills showing tax status. If appraisal not filed or tax not settled, so state and give particulars as material.

State here (and include notice) any questions requiring adjudication, inserting or attaching full statement of facts. Set forth, in detail, position of accountant.

10.

State in full all facts concerning any assignments or attachments of distributive shares and submit copies.

State here any additional receipts or disbursements since filing account, to be included in adjudication.

State here the identity and other material facts as to unknown or non-resident distributees under Pa. O.C. Rules 13.1, 13.2 and 13.3; Bucks O.C. Rule 13.3A; and 20 Pa. C.S.A. §4111.

Fractional shares shall be stated in proportions or in amounts. Agreed "in kind" awards shall be noted as such.
STATE WHETHER THE COURT SHOULD DIRECT A SCHEDULE OF DISTRIBUTION BE FILED.

Wherefore petitioner.....ask.....that distribution of the balance of principal and income be awarded to the person entitled, and suggests that the distributive shares are as follows:

.....

ATTORNEY FOR PETITIONER

ADDRESS.....

TEL #

PA I.D. #

State of Pennsylvania

:

: ss.

County of Bucks

:

.....

above-named petitioner...,being duly.....according to law,

depose(s) and say(s) that the facts set forth in the foregoing petition which are within

.....personal knowledge are true, and as to facts based upon information
(her, his, their)

received from others,.....believe(s) them to be true.

(she, he, they)

.....and subscribed

before me this.....day

of....., 19.....

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Attach all riders and other papers pertaining to any paragraph of the petition, to this page and to this page only.

Fasten papers IN this space, but so that all writing is below this space.

DO NOT ATTACH PAPERS PROJECTING BEYOND THIS FORM. FOLD IF NECESSARY.

