

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

ESTATE OF.....DECEASED

Sur trust for.....

## Petition for Adjudication

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

.....

Audit List of ....., 19.....

The Petition of .....

.....respectfully represents that:

1. Decedent died on.....19....., leaving a will dated  
..... 19....., probated on.....19....., wherein  
the trust is created as follows:

Quote relevant provisions of will creating trust.

If lengthy, a summarization will suffice. If accountant is not trustee named in will, state date and manner of appointment.

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

**2.**

If none, so state.

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

**3. The account is filed because**

**4. 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.

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

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.

**6. 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**

**Do not write in this space.  
Do not attach papers in this space, or on this page.**

**Do not write in this space.  
Do not attach papers in this space, or on this page.**

State facts as to Pa. Transfer Inheritance Tax and Pa. Additional Estate Tax, and  
Submit certificate or receipt of Register of Wills showing tax status. If appraisement not filed or tax not settled, so state and give particulars as material.

7.

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

8.

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 persons entitled, and suggests that the distributive shares are as follows:**

.....  
**ATTORNEY FOR PETITIONER**  
ADDRESS.....  
.....  
TEL # .....  
PA I.D. # .....

State of Pennsylvania

:

County of Bucks

: ss.

:

.....  
 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.....

**Do not write in this space.**  
**Do not attach papers in this space, or on this page.**

Do not write in this space.

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.**

File No. ....

Audit List of ....., 19.....

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**COURT OF COMMON PLEAS OF  
BUCKS COUNTY  
ORPHANS' COURT DIVISION**

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ESTATE OF

Deceased

Sur Trust for

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**Petition for Adjudication**

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**TO BE SUBMITTED HEREWITH:**

1. Copy of will, and codicils, if any, which will be attached to adjudication.
2. Appearance for parties represented.
3. Certificate or Original Receipt of Register of Wills showing status of inheritance tax.
4. Copies of notices of audit.

**ATTORNEY:  
ADDRESS:**

**TEL #:  
PA I.D. #:**

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If spaces provided in this form are insufficient to set forth the necessary and required facts and information, use space provided on page to which papers are to be attached to complete said facts and information.