

**ACCOUNT FILING CHECKLIST • AGENT UNDER POWER OF ATTORNEY**

ESTATE OF		PREPARER: ATTORNEY/ACCOUNTANT	TELEPHONE NUMBER
O.C. NUMBER		ADDRESS	
<p><b>INSTRUCTIONS:</b> An Agent filing an account must first complete this form, indicating in “preparer” column (<b>YES or N/A</b>) whether the items listed are included in the audit papers and/or the account. Items that are required in all cases are printed in <b>BOLD</b>. Upon review by the staff of the Clerk's Office, the account and related audit papers may be accepted for filing if complete or rejected if incomplete.</p>			
PREPARER	ITEM	O. C. CLERK	
	1a) <b>Account Coversheet and Summary Page</b> [Pa. O.C. Rule 6.1(b)]		
	1b) <b>Account - Signed by All Accountants and Verified by at Least One Accountant</b> [Phila. O.C. Rule 6.1.A.(2)]		
	2a) <b>Petition for Adjudication / Statement of Proposed Distribution Filed</b> [Phila. O.C. Rule 6.9.A.]		
	2b) <b>Petition for Adjudication / Statement of Proposed Distribution - Signed by All Accountants and Verified by at Least One Accountant</b> [Phila. O.C. Rule 6.9.B.]		
	3) <b>Copy of Power of Attorney - Certified True and Correct</b> [As required by Petition for Adjudication/Statement of Proposed Distribution]		
	4) <b>Statement of Method of Notice</b> [Phila. O.C. Rule 6.9.D.(1)(f)]		
	5) <b>Statement of Appointment of Personal Representative</b> [If required by Petition for Adjudication/Statement of Proposed Distribution]		
	6) <b>Agreement of Compromise and Settlement</b> [Phila. O.C. Rule 6.9.D.(1)(b)]		
	7) <b>Agreement Regarding Accountant's Compensation</b> [Phila. O.C. Rule 6.9.D.(1)(c)]		
	8a) <b>Certificate of Appointment of Foreign Fiduciary</b> [Phila. O.C. Rule 6.9.D.(6)(a)]		
	8b) <b>Affidavit of Foreign Fiduciary</b> [Phila. O.C. Rule 6.9.D.(6)(b)]		
	9) <b>Certification Regarding Prior Filed Originals</b> [Phila. O.C. Rule 6.9.D.(7)]		
<input type="checkbox"/> <b>ACCEPTED</b> <input type="checkbox"/> <b>REJECTED</b>		REVIEWED BY	DATE