

**PRINCIPAL'S ESTATE
(UNDER POWER OF ATTORNEY)**

**COURT OF COMMON PLEAS OF
PHILADELPHIA COUNTY, PENNSYLVANIA
ORPHANS' COURT DIVISION**

ESTATE OF _____, PRINCIPAL
ACCOUNT OF _____, AGENT(S)*

NO. _____ OF _____

PETITION FOR ADJUDICATION AND STATEMENT OF
PROPOSED DISTRIBUTION IN CONFORMITY WITH
PHILADELPHIA ORPHANS' COURT DIVISION RULES

This form shall be used in all cases involving the audit of an account of one or more agents acting under a power of attorney. All information shall be supplied or a re-audit may be required. If space is insufficient, riders may be attached.

**FASTEN ATTACHMENTS TO THE BACK OF THIS FORM.
SUBMIT APPEARANCE SLIP AT THE AUDIT.**

Name of Counsel:
Attorney I.D. No.:
Name of Law Firm:
Address:
Tel. No.:
Fax No.:
E-Mail (optional):

* The term "agent" shall include any person designated as an "attorney-in-fact" or acting in a similar capacity by the principal's delegation.

1. Name(s) and address(es) of petitioner(s):

2. Name(s) and address(es) of agent(s) (if not petitioner(s)):

3. Name and address of principal (and, if applicable, of each guardian appointed for principal, of each personal representative for any principal or agent who has died, and of his or her counsel, identifying the capacity of each):

4. A. Date of principal's Power of Attorney under which agent(s) acted:
B. Date agent(s) first exercised control of principal's assets under Power of Attorney:

(Attach copy of each different Power of Attorney granted to agent(s) by principal and copy of any decree involving agent(s) for principal).

5. Explain the reason for filing this account (if principal or agent has died, state date of death, and attach a short certificate; if principal has been adjudicated incapacitated, state date of decree, and attach a copy):

6. Describe all gifts/transfers for less than full and adequate consideration made under the Power of Attorney. Identify each recipient's name, address, and relationship to principal and/or agent, amount of each gift/transfer, nature of each (cash or kind), and date made, with any additional explanation deemed appropriate (if none, so state):

(Attach a copy of every known Federal Gift Tax Return (Form 709) for principal).

7. List all payment(s) of compensation or reimbursement of expenses to agent(s) and date(s) of payment (even if identified in account):

<u>Date</u>	<u>Recipient</u>	<u>Reason for Payment</u>	<u>Amount</u>
-------------	------------------	---------------------------	---------------

8. Identify every asset or interest of principal known to petitioner(s) and not identified in account, whether or not in possession or control of petitioner(s) (if none known, so state):

<u>Asset or Interest</u>	<u>Title or Registration</u>	<u>Value</u>	<u>Comment, if any</u>
--------------------------	------------------------------	--------------	------------------------

9. Identify each existing safe deposit box of or for principal and each one closed by agent(s) (if not applicable, so state):

<u>Institution and Address</u>	<u>Box No.</u>	<u>Title or Registration</u>	<u>Date Closed (if applicable)</u>
------------------------------------	----------------	----------------------------------	--

10. Are the entire contents of each safe deposit box identified in item 9, above, included in the filed account? _____(yes/no; if not, explain):

11. A. Identify each known unpaid claim against principal or principal's estate and describe each in detail (if none, so state):

B. State all questions requiring adjudication:

12. Written notice of the audit as required by Rule 6.3 and Local Rule 6.3.A. has been or will be given to each party in interest in the matter. In addition, notice of any known unpaid claim not admitted and of all questions requiring adjudication, as described in item 11, above, has been or will be given to all parties who may be affected.
- A. State the name and address of each such party and that party's relationship to the principal.
 - B. If notice has been given, attach a copy of the notice as well as a list with the name and address of each party receiving such notice.
 - C. If notice is yet to be given, a copy of the notice as well as a list with the name and address of each party receiving such notice shall be submitted at the audit together with a statement executed by petitioner(s) or counsel for petitioner(s), certifying that such notice has been given.
 - D. If any such party is not sui juris (e.g., incapacitated persons), notice of the audit has been or will be given to the appropriate representative on such party's behalf as required by Rule 5.2 and Local Rule 5.2.A.
13. Is a schedule of distribution requested? _____ (yes/no).

Wherefore, it is respectfully requested by your petitioner(s) that distribution be awarded to the persons entitled as follows:

Submitted By:
(All petitioners must **sign**. Add additional lines if necessary)

Name of petitioner:

Verification of Petitioner (Verification must be by **at least one** petitioner. Local Rule 6.9.B.)

The undersigned hereby verifies [that (s)he is _____ of the above-named _____ and]* that the facts set forth in the foregoing Petition for Adjudication and Statement of Proposed Distribution which are within the personal knowledge of the petitioner are true, and as to facts based on the information of others, the petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

(Signature of petitioner)

* Corporate petitioners shall complete bracketed information.

Certification of Counsel

The undersigned counsel hereby certifies that the foregoing Petition for Adjudication and Statement of Proposed Distribution is a true and accurate reproduction of the form petition authorized by the Court of Common Pleas of Philadelphia County, Orphans' Court Division, and that no changes to the form have been made beyond the responses herein.

(Signature of counsel for petitioner(s))