

IN THE COURT OF COMMON PLEAS OF BUTLER COUNTY, PENNSYLVANIA
ORPHANS' COURT DIVISION

JUDITH MOSER, M.S.
Register of Wills & Clerk of Orphans' Court

ESTATE ACCOUNTS
FILING INFORMATION SHEET

1. Accounts must be **filed in DUPLICATE** (*WHITE original, YELLOW duplicate*)
2. **BOTH COPIES MUST HAVE ORIGINAL SIGNATURES & NOTARY**
3. The following **requisite inserts must be included** in the **WHITE ORIGINAL ONLY**:
 - a. **NOTICE OF SERVICE** (*may be photocopy*)
 - b. **AFFIDAVIT OF SERVICE OF NOTICE** (*must be NOTARIZED ORIGINAL*)
Must have names, dates, type of service, etc.
 - c. **CERTIFICATION OF A/NO CHARITABLE INTEREST***
*Per Attorney General - For charitable interests over \$25,000 OR any that cannot be paid in full, a 15-day notice to Attorney General must be given **PRIOR TO FILING** an account. Proof of same must be attached to Certification and *before presentation to Court*, a copy of Attorney General's response must be received by Clerk of Orphans' Court.
 - d. **ORIGINAL PROOFS OF PUBLICATION**
Legal Journal
Local newspaper of general circulation
 - e. **COPY OF WILL** (*if applicable*)
 - f. **REAL ESTATE DECREE** (*if any*)**
**NOTE: REALTY DECREES MUST BE FILED IN DUPLICATE & BOTH HAVE BACKINGS FOR SIGNATURE
4. **BOTH COPIES OF ACCOUNT (WHITE & YELLOW) MUST HAVE ATTORNEY'S ORIGINAL SIGNATURE**
Please include **TYPED** ATTORNEY NAME, ADDRESS, PHONE, & ID# below signature
5. **All information must be completed on front & back of Account.**
Any extra pages (*excluding the requisite insert forms*) will be charged.
Computerized accountings may be inserted into front & back covers immediately following the required inserts. (charged @ \$2 per page)
1. FEES:

FINAL ACCOUNT (in duplicate)	\$125.+
+EXTRA PAGES OF ACCOUNTING	2.
REAL ESTATE DECREE (in duplicate)	10.
<u>(BACKS MUST BE COMPLETED)</u>	
7. Checks may be made payable to "**REGISTER OF WILLS**"
8. **PLEASE ENCLOSE A SELF-ADDRESSED, STAMPED ENVELOPE FOR CONFIRMATION NOTICE**

IN THE COURT OF COMMON PLEAS OF BUTLER COUNTY, PENNSYLVANIA
ORPHANS' COURT DIVISION

OC NUMBER _____ OF _____

ESTATE NUMBER: _____

ESTATE OF _____
LATE OF _____, Pennsylvania.

Date of Death: _____ Date of Letters: _____

Dates Published: _____
(Legal Journal) (Newspaper)

THIS IS THE _____ AND _____ (e.g., First & Partial/Final, etc.)

ACCOUNT of _____

the duly appointed Personal Representative(s) of the above-captioned estate.

INSTRUCTIONS: To comply with Supreme Court Rule, Section 6, Rule 1: Account must show dates of all receipts and disbursements, the source of all receipts, the names of all persons to whom disbursements are made and the purpose thereof; items of ADMINISTRATION, DISTRIBUTION, PRINCIPAL, and INCOME must be stated separately; the assets held by the Accountant on the date of filing and the Account must be separately itemized. See Purdon's Pennsylvania Forms Volume 6, page 293 (20 Pa. C.S. 320-701, Form 12) for suggested division and subdivision headings. Add additional sheets as needed. Any form held to be within the guidelines for accounts as published in the PA RULES OF COURT and inclusive of local Rule requirements will be accepted for filing.

SUMMARY

	Receipts	Disbursements	Balance
Schedule A: PERSONALTY PRINCIPAL			
Schedule B: PERSONALTY INCOME			
Schedule C: REAL ESTATE PRINCIPAL			
Schedule D: REAL ESTATE INCOME			
BALANCE FOR DISTRIBUTION			

SCHEDULE OF DISTRIBUTION
See Appropriate Schedule Attached Hereto

Filed _____

NOW, _____
it appearing that proper notice has been given, the Court has reviewed the accounting of Personal Representative(s) and, finding it in order, does hereby confirm *Ni Si* this Account.

By the Court

S. Michael Yeager, Judge

JUDITH MOSER, M.S.
Register of Wills & Clerk of Orphans' Court
My Commission Expires First Monday, January, 2012

**IN THE COURT OF COMMON PLEAS OF BUTLER COUNTY, PENNSYLVANIA
ORPHANS' COURT DIVISION**

**IN RE:
THE ESTATE**

:
:
:
:

ESTATE NO. 10- _____ - _____

Deceased

N O T I C E

Attached is a true and correct copy of the Court Accounting of _____

_____,
the Personal Representative(s) of the estate of the above-captioned Decedent. This Account will be filed with the Clerk of Orphans' Court of Butler County, Butler, PA on or before _____ and will be presented to the Court on _____. **Also attached hereto is a Statement of Proposed Distribution and a copy of the Will (if any).**

UNLESS WRITTEN OBJECTIONS OR EXCEPTIONS TO THE ACCOUNTING OR PROPOSED DISTRIBUTION ARE FILED IN ACCORDANCE WITH THE PA RULES OF COURT ON OR BEFORE _____, THE COURT MAY CONFIRM THE ACCOUNT/PROPOSED DISTRIBUTION ABSOLUTE.

Dated this _____ day of _____, _____.

Accountant Signature

Attorney of Record Signature

Address

Address

INSERT HERE

1. **ORIGINAL PROOFS OF PUBLICATION**
(Legal Journal & Newspaper)

AND

2. **PHOTOCOPY OF WILL** *(if applicable)*

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SCHEDULE OF PROPOSED DISTRIBUTION
*****Must be stated in \$\$\$ amounts*****

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**SCHEDULE A:
PERSONALTY PRINCIPAL
1. Receipts 2. Disbursements**

Date	Source / Payee & Purpose	Receipts	Disbursements	Balance
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I. RECEIPTS PER INVENTORY:

2. Disbursements

**SCHEDULE B:
PERSONALTY INCOME**
1. Receipts 2. Disbursements

Date	Source / Payee & Purpose	Receipts	Disbursements	Balance
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I. RECEIPTS PER INVENTORY:

2. Disbursements

**SCHEDULE C:
REAL ESTATE PRINCIPAL
1. Receipts 2. Disbursements**

Date	Source/Payee & Purpose	Receipts	Disbursements	Balance
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I. RECEIPTS PER INVENTORY:

2. Disbursements

**SCHEDULE D:
REAL ESTATE INCOME**
1. Receipts 2. Disbursements

Date	Source / Payee & Purpose	Receipts	Disbursements	Balance
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I. RECEIPTS PER INVENTORY:

2. Disbursements



AFFIDAVIT OF PERSONAL REPRESENTATIVE(S)

Personally came _____
the within named Accountant(s), who being duly sworn say(s) that the foregoing is a just and true accounting of the administration of the estate which came into his/her/their possession as Personal Representative(s) of the estate of _____, deceased, and that written notice of the filing of this Account and of its date for Confirmation has been given to every unpaid claimant who has given written notice of any claim(s) to the Accountant(s) or to the Attorney of Record, and to every other person known to the Accountant(s) to have an interest in this estate as beneficiary, heir or next-of-kin, as required by law and Rules of Court, and that more than four (4) months have elapsed since the advertisement of the grant of Letters in both the Butler County Legal Journal and a newspaper of general circulation.

Sworn to and Subscribed before me this _____
_____ day of _____,
A.D. _____.

_____(seal)
Notary Public
Expiration Stamp

CERTIFICATE OF ATTORNEY

AND NOW, this _____ day of _____, _____, I, the undersigned Attorney, hereby certify that the within Account was substantially prepared by me; that I have personal knowledge of the matters and things herein contained; and that the same is correct and in the form required by law and local Rules.

Signature _____ I.D. NO: _____
TYPED Name _____ PHONE: _____
Address _____ FAX: _____
Email: _____