

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

ORPHANS' COURT ACCOUNT CHECK LIST

File No. _____ Audit No. _____ Audit, 20____

Estate of _____

Account of _____

Executor, Administrator, Guardian, Trustee

FORM OF ACCOUNT SHALL COMPLY WITH STATE AND LOCAL ORPHANS' RULE 6

Certify whether the following have been filed (answer "yes" , "no" or " N.A." if not applicable):

- 1. Statement of Proposed Distribution. _____
- 2. Proofs of Publication. _____
 - (a) Have 4 months elapsed since first complete advertisement? _____
- 3. Inventory. _____
- 4. Copy of Federal Estate Tax Return. _____
 - (a) Has final clearance been obtained? _____

Certify as to the following:

- 5. Account contains:
 - (a) Complete description of real property on hand in kind (i.e. not converted), whether or not specifically devised. _____
 - (b) Legible true copy of the will. _____
 - (c) Copy of trust instrument or other document to be construed. _____
 - (d) Itemized list of all assets making up balance for distribution. _____
- 6. Are there any claims, whether admitted or not? _____
- 7. Are there any disputed claims? _____
- 8. Have all parties and claimants been given notice of audit as required by State and Local Orphans' Court Rule 6.3? _____
- 9. Are there any disputed questions of fact or law? _____
- 10. Has inheritance tax been paid in full? _____
 - (a) Has final clearance from the Department of Revenue been received? _____
- 11. Does Account comply with State and Local Orphans' Court Rule 6. 1? _____
- 12. If a guardian's or trustee's account, indicate briefly the purpose for filing _____

Dated: _____
Signature of Attorney Filing Account

CERTIFICATION ONLY BY CLERK OF ORPHANS' COURT:

- 1. Original proofs of publication and statements of proposed distribution are attached to account. _____
- 2. Inventory has been filed and a copy attached to account. _____
- 3. Copy of Federal Estate Tax Return has been filed. _____
- 4. Inheritance Tax has been paid in full and appraisal received. _____
- 5. Account complies with State and Local Rule 6. 1. _____

Dated: _____
Signature of Certifying Clerk