

ACCOUNT FILING CHECKLIST • DECEDENT'S ESTATE

|                                    |                               |                  |
|------------------------------------|-------------------------------|------------------|
| ESTATE OF<br><br><i>, DECEASED</i> | PREPARER: ATTORNEY/ACCOUNTANT | TELEPHONE NUMBER |
| O. C. NUMBER<br><br>OF             | ADDRESS                       |                  |

**INSTRUCTIONS:** Persons wishing to file an account must first complete this form, indicating in "preparer" column (**YES or N/A**) whether the items listed are included in the audit papers and/or the account. Items that are required in all cases are printed in **BOLD**. 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.

| PREPARER | ITEM   | O. C. CLERK |
|----------|--|-------------|
|          | 1a) <b>ACCOUNT COVERSHEET and SUMMARY PAGE</b> [O.C. Rule 6.1]   |             |
|          | 1b) <b>ACCOUNT SIGNED by ALL ACCOUNTANTS/VERIFIED by at LEAST ONE ACCOUNTANT</b> [O.C. Rule 6.1.A.]                                  |             |
|          | 2a) <b>PETITION for ADJUDICATION &amp; STATEMENT of PROPOSED DISTRIBUTION filed</b> [O.C. Rule 6.9.A.]                               |             |
|          | 2b) <b>PETITION for ADJUDICATION &amp; STATEMENT of PROPOSED DISTRIBUTION SIGNED by EACH ACCOUNTANT</b> [O.C. Rule 6.9.B.]           |             |
|          | 2c) <b>PETITION for ADJUDICATION &amp; STATEMENT of PROPOSED DISTRIBUTION VERIFIED by at LEAST ONE ACCOUNTANT</b> [O.C. Rule 6.9.B.] |             |
|          | 3a) <b>IF WILL, TYPED COPY of WILL &amp; CODICILS</b> [O.C. Rule 6.9.D.(2)(b)]   |             |
|          | 3b) <b>IF WILL, CERTIFIED CORRECT</b> [O.C. Rule 6.9.D.(2)(b)]   |             |
|          | 4) ORIGINAL LETTERS TESTAMENTARY or LETTERS OF ADMINISTRATION [O.C. Rule 6.9.D.(2)(a)]   |             |
|          | 5) <b>PROOF of ADVERTISEMENT of LETTERS</b> [O.C. Rule 6.9.D.(2)(a)] (unless filed by order of Court)                                |             |
|          | 6a) <b>TYPED COPY of INVENTORY</b> [O.C. Rule 6.9.D.(2)(b)]  |             |
|          | 6b) <b>CERTIFIED CORRECT</b> [O.C. Rule 6.9.D.(2)(b)]  |             |
|          | 7a) <b>STATEMENT of METHOD of NOTICE</b> [O.C. Rule 6.9.D.(1)(f)]  |             |
|          | 7b) NOTICE OF CHARITABLE GIFT TO ATTORNEY GENERAL [O.C. Rule 5.5]  |             |
|          | 8) PETITION to APPOINT/REQUEST to WAIVE GUARDIAN/TRUSTEE AD LITEM [O.C. Rule 12.4.A.]  |             |
|          | 9) INHERITANCE TAX RECEIPTS [O.C. Rule 6.9.D.(1)(e)]   |             |
|          | 10) AGREEMENT of COMPROMISE and SETTLEMENT [O.C. Rule 6.9.D.(1)(b)]  |             |
|          | 11) AGREEMENT REGARDING ACCOUNTANT'S COMPENSATION [O.C. Rule 6.9.D.(1)(c)]   |             |
|          | 12a) CERTIFICATE of APPOINTMENT OF FOREIGN FIDUCIARY [O.C. Rule 6.9.D.(6)(a)]  |             |
|          | 12b) AFFIDAVIT by FOREIGN FIDUCIARY [O.C. Rule 6.9.D.(6)(b)]   |             |
|          | 13) CERTIFICATION REGARDING PRIOR FILED ORIGINALS [O.C. Rule 6.9.D.(7)]  |             |
|          | 14) INCOME ACCOUNTING WAIVERS [O.C. RULE 6.9.D.(1)(d)]   |             |

ACCEPTED  
 REJECTED

REVIEWED BY

DATE