

COURT OF COMMON PLEAS OF PHILADELPHIA • ORPHANS' COURT DIVISION
ACCOUNT FILING CHECKLIST • AGENT UNDER POWER OF ATTORNEY

ESTATE OF	PREPARER: ATTORNEY/ACCOUNTANT	TELEPHONE NUMBER
O. C. NUMBER OF	ADDRESS	

INSTRUCTIONS: An Agent filing 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) Account Coversheet and Summary Page [Pa. O.C. Rule 6.1(b)]	
	1b) Account - Signed by All Accountants and Verified by at Least One Accountant [Phila. O.C. Rule 6.1.A.(2)]	
	2a) Petition for Adjudication / Statement of Proposed Distribution filed [Phila. O.C. Rule 6.9.A.]	
	2b) Petition for Adjudication / Statement of Proposed Distribution - Signed by All Accountants and Verified by at Least One Accountant [Phila. O.C. Rule 6.9.B.]	
	3) Copy of Power of Attorney - Certified True and Correct [As required by Petition for Adjudication/Statement of Proposed Distribution]	
	4) Statement of Method of Notice [Phila. O.C. Rule 6.9.D.(1)(f)]	
	5) Statement of Appointment of Personal Representative [If required by Petition for Adjudication/Statement of Proposed Distribution]	
	6) Agreement of Compromise and Settlement [Phila. O.C. Rule 6.9.D.(1)(b)]	
	7) Agreement Regarding Accountant’s Compensation [Phila. O.C. Rule 6.9.D.(1)(c)]	
	8a) Certificate of Appointment of Foreign Fiduciary [Phila. O.C. Rule 6.9.D.(6)(a)]	
	8b) Affidavit of Foreign Fiduciary [Phila. O.C. Rule 6.9.D.(6)(b)]	
	9) Certification Regarding Prior Filed Originals [Phila. O.C. Rule 6.9.D.(7)]	

ACCEPTED
 REJECTED

REVIEWED BY	DATE
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