

ACCOUNT FILING CHECKLIST • DECEDENT'S ESTATE

ESTATE OF _____, <i>DECEASED</i>	PREPARER: ATTORNEY/ACCOUNTANT	TELEPHONE NUMBER
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O. C. NUMBER _____ OF _____	ADDRESS & EMAIL ADDRESS
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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
	1) Account Cover Page and Summary Page [Pa. O.C. Rule 2.1(b)(4)(i)-(ii)]	
	2) Account Signed by All Accountants and Verified by at Least One Accountant [Pa. O.C. Rule 2.1(b)(4)(iv)]	
	3) Petition for Adjudication/Statement of Proposed Distribution Signed by Counsel [Pa. O.C. Rule 2.4(e)]	
	4) Petition for Adjudication/Statement of Proposed Distribution Signed by at Least One Accountant [Pa. O.C. Rule 2.4(d)]	
	5) Petition for Adjudication/Statement of Proposed Distribution Verified by at Least One Accountant [Pa. O.C. Rule 2.4(d)]	
	6) If Will, Typed Copy of Will & Codicils	
	7) If Will, Copy of Will & Codicils Certified Correct [Phila. O.C. Rule 2.4B(2)(b)]	
	8) Copy of Letters Testamentary or Letters of Administration [Phila. O.C. Rule 2.4 B(2)(a)]	
	9) Proof of Advertisement of Letters [Phila. O.C. Rule 2.4 B(2)(a)]	
	10) Typed Copy of Inventory	
	11) Copy of Inventory Certified Correct [Phila. O.C. Rule 2.4 B(2)(b)]	
	12) Statement of Method of Notice and Copy of Notice [Pa.O.C.Rule 2.5]	
	13) Notice of Charitable Gift to Attorney General [Pa.O.C.Rule 4.4(a)(13)]	
	14) Petition to Appoint/Rrequest to Waive Guardian/Trustee Ad Litem	
	15) Inheritance Tax Receipts [Phila. O.C. Rule 2.4B(1)(f)]	
	16) Agreement of Compromise and Settlement [Phila O.C. Rule 2.4B(1)(e)]	
	17) Agreement Regarding Accountant's Compensation [Phila O.C. Rule 2.4B(1)(d)]	
	18) Certificate of Appointment of Foreign Fiduciary [Phila O.C. Rule 2.4B(8)(a)]	
	19) Affidavit by Foreign Fiduciary [Phila O.C. Rule 2.4B(8)(b)]	
	20) Income Accounting Waivers [Phila O.C. Rule 2.4B(1)(e)]	

ACCEPTED
 REJECTED

REVIEWED BY _____	DATE _____
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