

CUMBERLAND COUNTY ORPHANS' COURT CHECKLIST - ACCOUNTS

Decedent/Trust/Incapacitated Person Name:

Case Number:	Audit Date:
Attorney:	Attorney Address:
Email:	
Attorney ID Number:	Attorney Phone Number:

Preparer (✓ if provided)	Documents	O/C Clerk	Account Review
	This Checklist		
	Choose Type: <input type="checkbox"/> Executor <input type="checkbox"/> Trust <input type="checkbox"/> Guardian <input type="checkbox"/> Minor		
	Choose One: This Account is <input type="checkbox"/> With <input type="checkbox"/> Without Distribution		
	If With Distribution, the amount \$ _____		
	*Gross Value of Estate/Trust \$ _____		
	Petition for Adjudication and Statement of Proposed Distribution		
	Signed by ALL Fiduciaries and Verified by At Least One Fiduciary		
	Certificate of Compliance or relevant Public Access Policy Form		
	Account Indicates First, Interim, First and Final, etc.		
	Certificate of Compliance or Relevant Public Access Policy Form		
	Copy of PA Revenue Notice(s) of Appraisement showing No Tax is Due		
	Proof of Advertisement of Letters, Must be Over 4 months prior to filing		
	Proposed Order and Self-Addressed, Stamped Envelope for Order and Copy of Account		
	Copy of Notice of Audit and Proof of Service of Sending Notice of Audit If not submitted at this time, enter date to be filed _____		
	Charitable Gift Clearance Certificate/Letter of No Objection from Office of Attorney General (if applicable) If not submitted at this time, enter date Notice sent to Attorney General _____		
	Copy of Medical Assistance Recovery Act Letter (if applicable)		

Attorneys are encouraged to be present or otherwise available during the Call of the List.

*These definitions are for determining our fees, not for legal advice:
Gross Value for an Estate = the taxable estate assets plus income generated by the estate.
Gross Value for a Testamentary Trust = only the income generated by the trust.

For Clerk of Orphans' Court Use

Gross Value: \$ _____

Account Fee based on Gross Value: \$ _____

Petition for Adjudication: \$ 50.00

Advertising: \$ 250.00

JCS & Auto (if applicable) \$ _____

Total: \$ _____