



REGISTER OF WILLS & CLERK OF ORPHANS' COURT

Rule 5.50 Settlement of Small Estates by Petition Checklist

Rule 5.50 Settlement of Small Estates by Petition - The following checklist is for **EXHIBITS** and **NOTICE ONLY**. It does not address requirements within the petition itself. Nothing in this document should be considered legal advice.

(a) Applicability - applies to all petitions filed pursuant to 20 Pa.C.S. § 3102, pertaining to settlement of small estates (under \$50,000) by petition.

(b) Content of petition – see rule.

(c) EXHIBITS:

- ☐ (1) An original death certificate;
- ☐ (2) A photocopy of the decedent's will along with either,
 - ☐ proof the original will was lodged or probated with the Register **or** a decree of the Register accepting a photocopy as the original;
- ☐ (3) Taxes:
 - ☐ Documentation supporting statement required by (b)(5) within the Petition, **if any**. Documentation can include Notice of Appraisal and Assessment of Tax, filed Inheritance Tax Return with proof of payment, or statement from Dept of Revenue that no tax is due;
- ☐ (4) Original consents, joinders, and statements of no objection signed by interested parties; and
- ☐ (5) A copy of any correspondence from the Dept. of Human Services **if needed** such as decedent was 55 or older or those decedents who were younger but receiving services.

(d) NOTICE:

- ☐ Notice served on interested parties.

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<https://www.cumberlandcountypa.gov/125/Register-of-Wills>