

GUIDE FOR FILING

PETITION FOR ADJUDICATION & FIRST AND FINAL ACCOUNT

O.C. Rule 4.6 Notice of the Date of Entry of an Adjudication or Court Order on the Docket

(a) The Clerk shall immediately give written notice of the entry of an adjudication or court order in particular matter to each party's counsel of record or, if unrepresented, to each party. The notice shall include a copy of the adjudication or court order.

PETITION FOR ADJUDICATION

(Testate or Intestate)

MUST INCLUDE THE FOLLOWING:

- ✓ ALL AKA'S of DECEASED as APPEARS on ORIGINAL PETITION for PROBATE
- ✓ SIGNED BY PETITIONER(S), VERIFICATION OF PETITIONER, and CERTIFICATION OF COUNSEL
- ✓ TWO (2) **ORIGINAL** PROOFS of PUBLICATION of ADVERTISEMENT of the GRANT OF LETTERS
(Account may be filed any time after four (4) months from the first complete advertisement of the original grant of letters)
- ✓ COPY of DEPARTMENT of HUMAN SERVICES NOTICE
- ✓ COPY of WRITTEN NOTICE of AUDIT with LIST of NAMES and ADDRESSES of the PARTIES RECEIVING SUCH NOTICE
- ✓ COUNTY INVENTORY REQUIRED to be FILED with REGISTER OF WILLS

FIRST AND FINAL ACCOUNTING

MUST INCLUDE THE FOLLOWING:

(Self-Addressed, Postage Paid Envelopes addressed pursuant to O.C. Rule 4.6 (a))

- ✓ ALL AKA'S of DECEASED as APPEARS on ORIGINAL PETITION for PROBATE
- ✓ SUMMARY of ACCOUNT
- ✓ RECEIPTS & DISBURSEMENTS
- ✓ VERIFICATION of ACCOUNT, SIGNED by PETITIONER(S)
- ✓ CERTIFICATION, SIGNED by COUNSEL (written notice of filing of the account and call for audit)

- ❖ *Account filing fee is based on principal receipts and income receipts*
- ❖ *Inventory filing fee \$10*
- ❖ *REV 1500 Inheritance Tax Return (filing fee **waived**, when filed w/accounting) **
****Note: Effective January 1, 2017, \$10 filing fee will apply***
- ❖ *No Staples*