

CHESTER COUNTY ORPHANS' COURT CHECKLIST – TRUST and POWER OF ATTORNEY

Settlor's/Decedent's/Principal's Name:

Party(ies) for whom **Trust** is established:(FBO)

Case Number:

Audit Date:

Check here **ONLY** if another account is **ANNEXED** as per Local Rule L6.1D

Attorney:

Attorney Address:

Attorney ID Number:

Attorney Phone Number:

*****DOCUMENTS MUST BE ASSEMBLED ACCORDING TO THE ORDER ON THIS CHECKLIST*****

Preparer (✓if provided)	Documents	O/C Clerk	Auditor
	Account - Face Sheet must include the following:		
	Account (Specify First, Interim, First and Final, etc.)		
	Value of Gross Estate (Total of Principal and Income Receipts)		
	Account - Summary Sheet with Proper Pagination		
	Account - Composition of Net Balance of Principal		
	Account - Composition of Net Balance of Income		
	Account - Signed by ALL Fiduciaries		
	Account - Verified by At Least One Fiduciary		
	Account - Certified by Attorney per Local Rule L6.1B(3)		
	Attorney's Entry of Appearance		
	Petition for Adjudication and Statement of Proposed Distribution		
	Signed by ALL Fiduciaries		
	Verified by At Least One Fiduciary		
	Charitable Gift Clearance Certificate (if applicable) If not submitted at this time, enter date Notice sent to Attorney General _____		
	Copy of Will/Codicil(s) <i>or</i> Trust/Amendment(s) <i>or</i> Power of Attorney certified by Attorney to be True and Correct		
	Original Trust Instrument/Amendment(s), if not previously filed, must be submitted as per Local Rule L1.2D		
	Copy of Notice of Audit <i>and</i> Proof of Service of Sending Notice of Audit		
	If not submitted at this time, enter date to be filed _____		
	Waiver(s) of Income Accounting (if applicable)		

All accounts must conform to Local Rules of the Orphans' Court Division of the Court of Common Pleas of Chester County. Forms and further information are provided at www.chesco.org/wills