

CHESTER COUNTY ORPHANS' COURT CHECKLIST - DECEDENT ESTATE

Decedent's Name:	
Case Number:	Audit Date:
Check here ONLY if another account is ANNEXED as per 20 Pa. C.S.A §7799.1 <input type="checkbox"/>	
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		
	Attorney's Entry of Appearance		
	Petition for Adjudication and Statement of Proposed Distribution		
	Signed by ALL Fiduciaries		
	Verified by At Least One Fiduciary		
	Copy(ies) of Inheritance Tax Receipt(s) or PA Revenue Notice(s) of Appraisalment		
	Charitable Gift Clearance Certificate (if applicable) If not submitted at this time, enter date Notice sent to Attorney General _____		
	Copy of Will and Codicil(s) Certified by Attorney to be True and Correct		
	Copy of Proofs of Publication in Chester County Law Reporter and Newspaper		
	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 _____		

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