

Account Filing Checklist - Guardian of Incapacitated Person

COURT OF COMMON PLEAS OF PHILADELPHIA • ORPHANS' COURT DIVISION		
ACCOUNT FILING CHECKLIST • GUARDIAN OF INCAPACITATED PERSON		
ESTATE OF _____ , NCAP	PREPARER: ATTORNEY/ACCOUNTANT	TELEPHONE NUMBER
O. C. NUMBER _____ OF _____	ADDRESS & EMAIL ADDRESS	
INSTRUCTIONS: Persons wishing to file an account must first complete this form, indicating in "preparer" column (YES or N/A) whether the items listed are included in the audit papers and/or the account. Items that are required in all cases are printed in BOLD . Upon review by the staff of the Clerk's Office, the account and related audit papers may be accepted for filing if complete or rejected if incomplete.		
PREPARER	ITEM	O. C. CLERK
	1) Account Cover Page and Summary Page [Pa. O.C. Rule 2.1(b)(4)(i)-(ii)]	
	2) Account Signed by All Accountants and Verified by at Least One Accountant [Pa. O.C. Rule 2.1(b)(4)(iv)]	
	3) Petition for Adjudication/Statement of Proposed Distribution Signed by Counsel [Pa. O.C. Rule 2.4(e)]	
	4) Petition for Adjudication/Statement of Proposed Distribution Signed by at Least One Accountant [Pa. O.C. Rule 2.4(f)]	
	5) Petition for Adjudication/Statement of Proposed Distribution Verified by at Least One Accountant [Pa. O.C. Rule 2.4(g)]	
	6) Copy of Decree or Instrument Appointing Guardian [Phila. O.C. Rule 2.4B(5)(a)]	
	7) If Deceased, Statement of Appointment of Personal Representative [Phila. O.C. Rule 2.4B(5)(b)]	
	8) Statement of Method of Notice and Copy of Notice [Pa. O.C. Rule 2.5]	
	9) Agreement of Compromise and Settlement [Phila. O.C. Rule 2.4B(1)(c)]	
	10) Agreement Regarding Accountant's Compensation [Phila. O.C. Rule 2.4B(1)(d)]	
	11) Certificate of Appointment of Foreign Fiduciary [Phila. O.C. Rule 2.4B(3)(a)]	
	12) Affidavit by Foreign Fiduciary [Phila. O.C. Rule 2.4B(3)(b)]	
	13) Income Accounting Waivers [Phila. O.C. Rule 2.4B(1)(e)]	
<input type="checkbox"/> ACCEPTED <input type="checkbox"/> REJECTED	REVIEWED BY _____	DATE _____

10-132D (7-20-16)