

**SUPREME COURT OF PENNSYLVANIA  
ORPHANS' COURT PROCEDURAL RULES COMMITTEE**

**NOTICE OF PROPOSED RULEMAKING**

**Proposed Amendment of the Index and Appendix of  
Orphans' Court and Register of Wills Forms**

The Orphans' Court Procedural Rules Committee is planning to propose to the Supreme Court of Pennsylvania the amendment of the Index and Appendix of Orphans' Court and Register of Wills Forms, removing the Estate Information Sheet, Form RW-01, for the reasons set forth in the accompanying explanatory report. Pursuant to Pa.R.J.A. No. 103(a)(1), the proposal is being published in the *Pennsylvania Bulletin* for comments, suggestions, or objections prior to submission to the Supreme Court.

Any reports, notes, or comments in the proposal have been inserted by the Committee for the convenience of those using the rules. They neither will constitute a part of the rules nor be officially adopted by the Supreme Court. Additions to the text of the proposal are bolded and underlined; deletions to the text are bolded and bracketed.

The Committee invites all interested persons to submit comments, suggestions, or objections in writing to:

**Orphans' Court Procedural Rules Committee  
Supreme Court of Pennsylvania  
Pennsylvania Judicial Center  
PO Box 62635  
Harrisburg, PA 17106-2635  
FAX: 717-231-9526  
orphanscourtproceduralrules@pacourts.us**

All communications in reference to the proposal should be received by **March 23, 2018**. E-mail is the preferred method for submitting comments, suggestions, or objections; any e-mailed submission need not be reproduced and resubmitted via mail. The Committee will acknowledge receipt of all submissions.

By the Orphans' Court Procedural Rules Committee,

Wayne M. Pecht, Esq.  
Chair

## REPORT

### **Proposed Amendment of the Index and Appendix of Orphans' Court and Register of Wills Forms**

#### REMOVAL OF ESTATE INFORMATION SHEET FROM FORMS' APPENDIX

The Orphans' Court Procedural Rules Committee ("Committee") is planning to propose to the Supreme Court of Pennsylvania the removal of the Estate Information Sheet, Form RW-01, from the Index and Appendix of Orphans' Court and Register of Wills Forms.

The Estate Information Sheet, RW-01<sup>1</sup>, appears in the Appendix of Orphans' Court and Register of Wills Forms as well as on the website of the Unified Judicial System ("UJS"). This form was not adopted by the Supreme Court; rather, it was promulgated and is updated by the Pennsylvania Department of Revenue. Although not a Supreme Court form, the Estate Information Sheet was maintained with the Register of Will Forms in the Appendix and on the UJS website for public convenience.

The Department of Revenue revised the Estate Information Sheet in November 2015. Rather than continuing to update the form in response to changes by the Department of Revenue, the Committee plans to recommend the removal of the Estate Information Sheet from the Appendix and UJS website, and, instead, direct the public to the Department of Revenue website. This change will ensure that practitioners and the public are directed to the most current version of the form as made available by the agency responsible for its promulgation and updates.

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<sup>1</sup> The current Estate Information Sheet is Department of Revenue form number REV-346 EX (11-15).

**INDEX TO APPENDIX  
ORPHANS' COURT AND REGISTER OF WILLS FORMS  
ADOPTED BY SUPREME COURT  
PURSUANT TO Pa. O.C. Rule 1.8**

**Available as Fill-in Forms on Website  
of Administrative Office of Pennsylvania Courts  
<http://www.pacourts.us/Forms/OrphansCourtForms.htm>**

**Orphans' Court and Administration Forms**

**A. Audit and Administration Forms**

1. Decedent's Estate: Petition for Adjudication /Statement of Proposed Distribution Pursuant to Pa. O.C. Rule 2.4 ..... OC-01
2. Trust: Petition for Adjudication /Statement of Proposed Distribution Pursuant to Pa. O.C. Rule 2.4 ..... OC-02
3. Guardianship of Incapacitated Person: Petition for Adjudication /Statement of Proposed Distribution Pursuant to Pa. O.C. Rule 2.4 ..... OC-03
4. Guardianship of Minor: Petition for Adjudication /Statement of Proposed Distribution Pursuant to Pa. O.C. Rule 2.4 ..... OC-04
5. Principal's Estate (Under Power of Attorney): Petition for Adjudication/Statement of Proposed Distribution Pursuant to Pa. O.C. Rule 2.4 ..... OC-05
6. Notice of Charitable Gift (In Accordance with Pa. O.C. Rule 4.4) ..... OC-06
7. Notice of Claim ..... OC-07

**B. Guardianship Forms**

1. Important Notice - Citation with Notice (Pa. O.C. Rule 14.2) ..... G-01
2. Annual Report - Guardian of Estate ..... G-02
3. Annual Report - Guardian of Person ..... G-03
4. Guardian's Inventory ..... G-04

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| 5. Guardianship of Incapacitated Person: Petition for Adjudication/Statement of Proposed Distribution Pursuant to Pa. O.C. Rule 2.4 .....      | OC-03*           |
| 6. Guardianship of Minor: Petition for Adjudication/Statement of Proposed Distribution Pursuant to Pa. O.C. Rule 2.4 .....                     | OC-04**          |
| C. Abortion Control Act Forms  |                  |
| 1. Minor's Application for Judicial Authorization of an Abortion (Pa. O.C. Rule 16.10).....  | ACA-01           |
| 2. Confidential Unsworn Verification by a Minor (Pa. O.C. Rule 16.10)...   | ACA-02           |
| D. Register of Wills Forms   |                  |
| 1. Estate Information Sheet .....  | <b>[RW-01]**</b> |
| <b>[(Not adopted by Supreme Court; form promulgated by Department of Revenue and maintained with Register of Wills forms for convenience)]</b> |                  |
| 2. Petition for Grant of Letters .....   | RW-02            |
| 3. Oath of Subscribing Witness(es) .....   | RW-03            |
| 4. Oath of Non-subscribing Witness(es) .....   | RW-04            |
| 5. Oath of Witness(es) to Will Executed by Mark.....   | RW-05            |
| 6. Renunciation .....  | RW-06            |
| 7. Notice of Estate Administration Pursuant to Pa. O.C. Rule 10.5 .....  | RW-07            |
| 8. Certification of Notice under Pa. O.C. Rule 10.5 .....  | RW-08            |
| 9. Inventory .....   | RW-09            |
| 10. Pa. O.C. Rule 10.6 Status Report .....   | RW-10            |

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\* Form OC-3 is not reprinted here and is located under Audit and Administration Forms at No. 3.

\*\* Form OC-4 is not reprinted here and is located under Audit and Administration Forms at No. 4.

\*\*\* **The Estate Information Sheet is not a form adopted by the Supreme Court. It is available on the Department of Revenue website ([www.revenue.pa.gov](http://www.revenue.pa.gov)), and is no longer maintained with the Register of Wills Forms.**

## E. Model Forms of Account

1. National Fiduciary Accounting Standards Project –  
1983 Report of Fiduciary Accounting Standards Committee
2. Model Estate Account
3. Model Trust Account
4. Model Charitable Remainder Unitrust Account

## F. Adoption Forms

1. Notice of Orphans' Court Proceedings to be Filed With Clerk in Dependency Proceeding by Solicitor of County Agency (Pa. O.C. Rule 15.6(b))
  - a. Praecipe to Clerk in Dependency Proceeding of Filing of a Petition to Terminate Parental Rights, Confirm Consent, or Adopt
  - b. Praecipe to Clerk in Dependency Proceeding of Entry of Decision Disposing of Petition
  - c. Praecipe to Clerk in Dependency Proceeding of Filing of Notice of Appeal
  - d. Praecipe to Clerk in Dependency Proceeding of Entry of Decision Disposing of Appeal
2. Foreign Adoption Forms
  - a. Form for Registration of Foreign Adoption Decree (Pa. O.C. Rule 15.8), including Instructions for Filing Petition, Petition to Register Foreign Adoption Decree, and Proposed Final Decree
  - b. Form Petition for Adoption of a Foreign Born Child (Pa. O.C. 15.9), including the Petition for Adoption of a Foreign Born Child, Report of the Intermediary, Verification of Translator, Preliminary Decree, and Final Decree