

**This section contains the forms necessary to file probate of an estate in the District of Columbia for persons dying on or after July 1, 1995 but before April 27, 2001, and consists of the following forms:**

• Court Costs/98 .....	1 page
• Form 800—Petition for Probate .....	3 pages, 2-sided
• Form 801—General Information Sheet .....	2 pages, 2-sided
• Form 802—Abbreviated Probate Order .....	1 page, 2-sided
• Form 802A—Standard Probate Order .....	1 page, 2-sided
• Form 803—Consent to Appointment of Personal Representative .....	1 page
• Form 804—Bond of Personal Representative Pursuant to D.C. Code §20-502(a) .....	1 page
• Form 804A—Bond of Personal Representative Pursuant to D.C. Code §20-502(a-1) .....	1 page
• Form 805—Petition for Personal Representative’s Bond Pursuant to D.C. Code §20-502(a-1) .....	1 page
• Form 806—Waiver of Personal Representative’s Bond .....	1 page
• Form 807—Notice of Standard Probate .....	1 page
• Form 808—Notice of Appointment, Notice to Creditors and Notice to Unknown Heirs .....	1 page
• Form 809—Verification and Certificate of Notice By Personal Representative Pursuant to SCR-PD 403(b)(4) .....	1 page, 2-sided
• Form 810—Inventory .....	1 page, 2-sided
• Form 810A—Inventory Schedule .....	1 page
• Form 811—Petition for Order Directing Payment of Claim Pursuant to D.C. Code §20-909(a) .....	1 page
• Form 812—Notice of Action Taken on Claim .....	1 page
• Form 813—Request for Extension of Personal Representative’s Appointment (Unsupervised) .....	1 page
• Form 813A—Order Extending Appointment of Personal Representatives (Unsupervised) .....	1 page
• Form 814—Waiver of Filing Inventories and Accounts .....	1 page
• Form 815—Notice Accompanying Final Account of Supervised/Unsupervised Personal Representative .....	1 page
• Form 816—Waiver of Formal Audit of Account and Consent to Account as Stated .....	1 page
• Form 816A—Consent to Account in Unsupervised Administration .....	1 page
• Form 817—Petition for Termination of Appointment of Supervised Personal Representative .....	1 page, 2-sided
• Form 817A—Order Terminating Appointment of Supervised Personal Representative(s) .....	1 page
• Form 818—Certificate of Completion (Unsupervised) .....	1 page, 2-sided
• Form 819—Notice of Foreign Personal Representative and Notice to Creditors .....	1 page
• Form 820—Notice of Agent to Accept Service of Process .....	1 page
• Form 617—Statement of Account as Follows: .....	16 pages
Sheet 1—( <i>persons dying before July 1, 1995</i> ) .....	1 page, 2-sided
Sheet 1A—( <i>persons dying on or after July 1, 1995</i> ) .....	1 page, 2-sided
Sheet 2—Summary of Transactions .....	1 page
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Sheet 5—Schedule C—Increases &/or Decreases in Assets .....	1 page
Sheet 6—Schedule D—Dividend and interest Income .....	1 page
Sheet 7—Schedule E—Miscellaneous Income (including rents and royalties) .....	1 page
Sheet 8—Schedule F—Principal Administration Expenses .....	1 page
Sheet 9—Schedule G—Principal Disbursements .....	1 page
Sheet 10—Schedule H—Income/Administration Expenses .....	1 page
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# Superior Court of the District of Columbia

## COURT COSTS

(Effective July 1, 1995)

Pursuant to SCR-Probate 425(a) and SCR-Probate 425(c)

### STANDARD & ABBREVIATED PROBATE PROCEEDINGS

### MISCELLANEOUS CHARGES

#### VALUE OF PROBATE ESTATE

Under \$500.....	No cost
\$500.01 to \$2,500 .....	\$15
\$2,500.01 to \$15,000 .....	\$50
\$15,000.01 but less than \$25,000 .....	\$100
\$25,000 but less than \$50,000 .....	\$150
\$50,000 but less than \$75,000 .....	\$250
\$75,000 but less than \$100,000 .....	\$350
\$100,000 but less than \$500,000 .....	\$575
\$500,000 but less than \$750,000 .....	\$825
\$750,000 but less than \$1,000,000 .....	\$1,275
\$1,000,000 but less than \$2,500,000 .....	\$1,800
\$2,500,000 but less than \$5,000,000 .....	\$2,300
\$5,000,000 and over .....	\$2,300
	Plus 0.02% of excess over \$5,000,000

#### COSTS ITEM

For filing cases substituting trustees and complaints under SCR-PD 107 .....	\$120
Filing counterclaim, crossclaim, or 3rd party claim .....	\$20
For issuing each alias summons .....	\$10
For appointment of special process server .....	\$5
For taking affidavit or affirmation .....	\$1
Administration of Estates not in excess of \$15,000:.	
(A) Under \$500 .....	No cost
(B) \$500.01 to \$2,500 .....	\$15
(C) \$2,500.01 to \$15,000 .....	\$50
For additional letters of administration or guardianship and nonresident certificates .....	\$1 per copy
For copies of documents .....	50¢ per page
For docketing claims .....	\$5
For searching records .....	\$10
For Rule or Order to Show Cause, Objections to Accounts, miscellaneous Motions, etc. ....	\$20
For attending safe deposit box opening .....	\$25
For Institution of Proceedings by Foreign Personal Representative (D.C. Code §20-341 and SCR-PD.427) .....	\$25
For certified copy or true seal copy .....	\$5
For issuing Triple Seal .....	\$20
For Notice of Appeal .....	\$5
For Petition for Revision of Value (D.C. Code §20-714) .....	\$20
For Petition for Review of Employment of Agents and Compensation of Personal Representatives and Employed of Estate (D.C. Code §20-753) .....	\$20
For Petitions for Supervised Administration (D.C. Code §20-403) .....	\$20
For Request for Extensions (D.C. Code §20-130.1(c)) .....	\$20
For any petition filed under SCR-PD 412 by one other than the personal representative or special administrator .....	\$20

#### COURT COSTS

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_

Deceased

## PETITION FOR PROBATE

(For decedents dying on or after July 1, 1995 and before April 27, 2001)

- Petition for Abbreviated Probate
  - Unsupervised Administration
  - Supervised Administration
- Appointment of Personal Representative(s)
- Appointment of Successor Personal Representative(s)
  - Unsupervised Administration
  - Supervised Administration
- Petition for Standard Probate
  - Unsupervised Administration
  - Supervised Administration
- Appointment of Co-Personal Representative(s) (each must sign)
- Appointment of Special Administrator(s)

**NOTE:** The appointment of a personal representative shall constitute an order for unsupervised administration unless the order specifically provides for supervised administration as provided in D.C. Code Section 20-402.

### The Petition of:

\_\_\_\_\_  
Name Age Address

\_\_\_\_\_  
Name Age Address

\_\_\_\_\_  
Name Age Address

hereinafter "petitioner" being a citizen of the United States or a lawfully admitted permanent resident thereof, of legal age, and not otherwise excluded from acting as personal representative pursuant to D.C. Code §20-303(b), shows:

1. \_\_\_\_\_, the decedent, a domiciliary of \_\_\_\_\_  
residing at \_\_\_\_\_ died at \_\_\_\_\_ place  
on \_\_\_\_\_ (with) (without) a will.

2. Petitioner is entitled to be appointed personal representative of the decedent's estate under D.C. Code §20-303 for the following reasons: \_\_\_\_\_  
\_\_\_\_\_

3. The court has jurisdiction in this matter because —  
 decedent died domiciled in the District of Columbia  
 other — please state basis for jurisdiction \_\_\_\_\_

4. There are no other proceedings regarding the administration of the estate except \_\_\_\_\_  
\_\_\_\_\_

5. The petitioner has made a diligent search for wills and codicils of the decedent, and, to the best knowledge of the petitioner the will dated \_\_\_\_\_ and codicils dated \_\_\_\_\_ accompanying

this petition (is) (are) the decedent's last will, and petitioner knows of no later will or codicil, and said will and codicil(s), if any, came into petitioner's hands in the following manner: \_\_\_\_\_

6. All information required pursuant to D.C. Code §20-304(a) has been furnished except \_\_\_\_\_

**NOTE: Paragraphs 7- 9 may be completed at the option of the petitioner. (Attach additional sheets if necessary.)**

7. It is requested that witnesses to the alleged will dated \_\_\_\_\_ appear and give testimony regarding its execution, (give reasons and complete names and addresses of witnesses): \_\_\_\_\_

8. It is requested that an individual having custody of the original will be directed to deliver same to the Court. (State reasons for this request including all demands made for delivery of the will): \_\_\_\_\_

9. It is requested that the Court issue an Order to Show Cause why the provisions of a lost or destroyed will should not be admitted to probate. (Set forth the reasons for this requested relief): \_\_\_\_\_

10. If supervised administration is (required) (requested) it is for the following reasons:

Decedent's will directs supervised administration.

Although decedent's will directs unsupervised administration, supervised administration is requested for the following reasons: \_\_\_\_\_

Other \_\_\_\_\_

11.  Bond is not required because (Note: Refer to D.C. Code Section 20-502 for bond provisions).

decedent's will waives bond.

a signed written waiver of each interested person has been filed.

the personal representative(s) (is/are) the sole heir(s)/legatee(s).

Bond is required and no reduction in bond is requested.

Bond is required in the amount of \$ \_\_\_\_\_ because some but less than all interested persons waive bond.

Bond is required but a reduction is requested in the amount of \$ \_\_\_\_\_, being the value of any real or personal property, the sale or distribution of which will be restricted without prior court authorization.

(If reduced bond is sought list cash accounts requiring Court order for withdrawal and/or other personal or real property for which prior court authorization for sale or distribution must be obtained). \_\_\_\_\_

Petitioner seeks the following limitation(s) on his/her powers - Refer to D.C. Code Sections 20-404, 20-406 and 20-741 with respect to powers. \_\_\_\_\_

(Note: If bond is required but sought in reduced amount requiring Court order prior to withdrawal of cash on deposit in a specific account(s) or requiring a

**The decedent was survived by - (please check appropriate boxes)**

- a.  Spouse.  No spouse. Check appropriate box and go to b.
- b.  Children.  Descendants of predeceased children. If so, stop here; if not, go to c.
- c.  Grandchildren.  Descendants of predeceased grandchildren. If so, stop here; if not, go to d.
- d.  Parents. If so, stop here; if not go to e.
- e.  Brothers and/or Sisters.  Descendants of predeceased brothers and/or sisters. If so, stop here; if not, go to f.
- f.  Nieces and/or Nephews.  Descendants of predeceased nieces and/or nephews. If so, stop here; if not, go to g.
- g.  Uncles and/or Aunts. If so, stop here; if not, go to h.
- h.  First cousins. If so, stop here; if not, go to i.
- i.  Grandparents. If so, stop here; if not, go to j.
- j.  Other heirs. If none, go to k.
- k.  Notify Office of the Corporation Counsel, Special Litigation Section,  
441 4th Street, N.W., 6th Floor, Washington, D.C. 20001

**LIST OF INTERESTED PERSONS** must include names of heirs if decedent died intestate; heirs and legatees, including trustees and all named Personal Representatives if the decedent died testate. Refer to D.C. Code §19-301 through 312 and §20-101(d)(1). Add additional sheets, if needed. Note: If each trustee is also a petitioning party or acting personal representative, list all beneficiaries under trust. Refer to D.C. Code §20-101 (g). Any creditor of the decedent, including those persons whose rights accrue at the time of death, *who has timely presented a claim in excess of \$500* that has not been barred or discharged is also an interested person. Petitioner(s) should update list of interested persons or creditors with claims in excess of \$500 as they become known.

**Indicate, when applicable, grandchildren and nieces and nephews by family groups,  
by showing the name of their deceased parent who was related to the decedent**

<b>Interested Person</b>	<b>Address</b>	<b>Relationship (Age, if under 18)</b>
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**(Use continuation sheet if necessary)**

(If under age of 18 or an adult who is legally disabled, also list as an interested person the judicially appointed guardian, conservator or committee for such person. If no judicially appointed representative exists then list the parent, or custodian, or an attorney-in-fact, if any, for such person (subject to the terms of the power of attorney), or any other person with legal authority to act for such disabled person.)

**WITNESSES TO WILLS/CODICILS (Names)**

**(Use continuation sheet if necessary)**

**Character, Location and Estimated Value of Property titled in decedent's name:**

**Real Property** located in the District of Columbia

**Estimated Value**

**Total \$** \_\_\_\_\_

**Personal Property** located in the District of Columbia and other jurisdictions

**Total \$** \_\_\_\_\_

**Debts and Funeral Expenses**

Debts secured:

**Total \$** \_\_\_\_\_

Debts Unsecured:

**Total \$** \_\_\_\_\_

Funeral Expenses:

Paid by \_\_\_\_\_  
name

**Amount paid \$** \_\_\_\_\_

Unpaid

**Amount unpaid \$** \_\_\_\_\_

**WHEREFORE**, the petitioner prays that petitioner(s) be appointed (supervised) (unsupervised) personal representative(s) of the decedent's estate in (abbreviated) (standard) probate proceeding, and that the (court find that the decedent died intestate) (will dated \_\_\_\_\_ and codicil(s) dated \_\_\_\_\_, exhibited with the petition be admitted to probate and record) and that the additional relief be granted:

Check appropriate box(es)

- order witnesses to the alleged will dated \_\_\_\_\_, to appear and give testimony regarding its execution;
- order \_\_\_\_\_ who is alleged to have custody of will dated \_\_\_\_\_, to deliver it to the Court;
- order any interested person to show cause why the provisions of the lost or destroyed will dated \_\_\_\_\_, should not be admitted to probate;
- Other \_\_\_\_\_

#### DECLARATION OF PETITIONER

I do solemnly declare and affirm under the penalty of law that the contents of the foregoing petition are true and correct to the best of my knowledge, information and belief.

- I am a member of the D.C. Bar and hereby guarantee court costs and publication costs.

\_\_\_\_\_  
Signature of Attorney for Petitioner

\_\_\_\_\_  
Signature of Petitioner

\_\_\_\_\_  
(Tel. No.)

\_\_\_\_\_  
Typed name of Attorney

\_\_\_\_\_  
Signature of Petitioner

\_\_\_\_\_  
(Tel. No.)

\_\_\_\_\_  
Attorney's Address

\_\_\_\_\_  
Signature of Petitioner

\_\_\_\_\_  
(Tel. No.)

\_\_\_\_\_  
Telephone No.

\_\_\_\_\_  
Unified Bar No.



# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

## GENERAL INFORMATION FOR HEIRS, LEGATEES, AND CREDITORS

(For estates of decedents dying on or after July 1, 1995)

### INTRODUCTION

Pursuant to the provisions of D.C. Code §20-704(b) (1981 & Supp. 1995)<sup>1</sup>, the Personal Representative of a decedent's estate is required to send this statement of general information to each heir, legatee, and known creditor. The law requires that this statement contain the following information:

- (1) the typical duties of a Personal Representative, including a description of the essential steps of estate administration;
- (2) how fees for estate administration are determined in this jurisdiction and that the Personal Representative is to be provided as soon as feasible with an estimate of fees to be claimed against the estate;
- (3) the rights of heirs and legatees, the assistance an heir or legatee may provide to the Personal Representative and the role of the Register of Wills;
- (4) if the Personal Representative is not subject to continuing court supervision, the right of any interested person, on petition to the Court duly presented and filed with the Register, to initiate a proceeding requiring notice to interested persons and a hearing to impose Court supervision on the estate, or to seek any other court order necessary for protection of rights of the interested person.

This information is intended only to highlight certain aspects of this process and is not intended to be a detailed and complete legal guide for the administration of an estate. Depending on the factual situation in a particular case, the rights of certain classes of heirs and legatees may differ from others. This summary is not meant to include a description and explanation of the entire probate procedure as it may affect the rights of all parties. For more complete information, refer to Title 20 of the District of Columbia Code, court decisions relating thereto, the Court Rules, and consult an attorney.

The following definitions are provided to assist in the understanding of this information:

<b>Creditor:</b>	A person or organization owed money by the decedent, at the time of death.
<b>Heir:</b>	A relative of a decedent who inherits property if the decedent had no will.
<b>Interested Person:</b>	An heir, legatee, or creditor who timely presents a claim of \$500 or more.
<b>Legatee:</b>	A surviving spouse or person who, under the terms of a will, would receive property.
<b>Personal Representative:</b>	The person appointed by the D.C. Superior Court to settle the financial affairs of someone who has died.
<b>Supervised Administration:</b>	An estate administration wherein the actions of the personal representative are supervised by the court.
<b>Unsupervised Administration:</b>	An estate administration wherein the actions of the personal representative generally are not supervised by the court.

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1. All citations to the D.C. Code herein refer to the 1981 edition and the 1997 Replacement Volume

As an heir, legatee, or creditor, it is important that you understand your rights, what to expect during the administration of the estate, and how to protect your interests in the estate. An administration begins with the appointment of the personal representative by order of the court. The administration will proceed unsupervised unless the court order of appointment specifically provides for supervised administration.

An unsupervised personal representative is not required to file an inventory or accounts with the Court and is not subject to continuing court supervision. If supervised, the personal representative will be required to file an inventory and accounts which are audited by the Court.

Each time an account or other notice from the personal representative is provided to you, it will state how and when you may oppose or object to that document. Note carefully that you must make any such objection within the stated time period, or you will lose the right to do so. Because of these time limits, you should carefully and promptly review all documents received from the personal representative.

## I. TYPICAL DUTIES OF A PERSONAL REPRESENTATIVE

- (a) Whether supervised or unsupervised the Personal Representative must:
- (1) determine the kind, amount, and location of all assets of the decedent and where feasible bring them into the Personal Representative's possession;
  - (2) determine the whereabouts of all of the decedent's heirs and legatees, and make reasonable efforts to identify creditors of the decedent;
  - (3) give a bond to protect the interests of all interested persons and creditors unless excused by the testator in a will or excused by the interested persons;
  - (4) within 20 days after appointment, publish a notice in the newspaper advising persons who have claims against the decedent to file claims with the Court, and after the expiration of this publication period, (6 months), pay the valid claims in accordance with the law;
  - (5) within three months after appointment, prepare and deliver or mail to each interested person a detailed inventory and appraisal of all estate assets;
  - (6) within 90 days after appointment certify to the Register of Wills that notices required under D.C. Code §20-704(b) have been given, and file proofs of publication;
  - (7) prepare and file decedent's final federal and state income tax returns; estate income tax returns, and inheritance and estate tax returns, both federal and state, where such returns are required by law.
- (b) If unsupervised, the Personal Representative:
- (1) may file the inventory with the Court at his or her option;
  - (2) shall account to interested persons for all receipts, disbursements and distributions of estate assets at reasonable intervals, or on reasonable demand. These accounts are not filed with the Court;
  - (3) may make full distribution and close the estate by filing a Certificate of Completion or Petition to Terminate at any time after expiration of the time for filing creditors claims against the estate. If no Certificate is filed, the appointment of the unsupervised Personal Representative will terminate automatically 3 years after appointment, unless extended by the Court.
- (c) If supervised, the Personal Representative:
- (1) must file the inventory with the Court;
  - (2) within one year and one day of the first publication of notice, prepare, deliver to interested persons and file with the Court an account setting forth all assets of the decedent's estate, all transactions made such as purchases, sales, leases, etc., all disbursements and a statement as to the value of any remaining assets. This account will be audited by the Court in a very cursory and informal way if all heirs and legatees consent to such audit. Otherwise, the Personal Representative will be required to exhibit detailed documentation to support every asset and disbursement shown in the account;

- (3) continue to render accounts every 9 months after the first account until rendering a final account;
- (4) within 30 days after approval by the Court of a final account, distribute remaining assets to the heirs or legatees. Approval of a final account automatically closes the estate and terminates the appointment of the Personal Representative if requested in the account.

## II. DETERMINATION OF FEES

- (a) The Personal Representative and any other agent employed by the Personal Representative are each entitled to reasonable compensation for services rendered.
- (b) As soon as feasible, employees or agents providing services for estate administration must provide an estimate to the Personal Representative of the fees expected to be charged.
- (c) The reasonableness of the compensation may be reviewed by the Court only upon request of an interested person and after notice and hearing.
- (d) The Personal Representative and any agent employed by the estate should maintain accurate records of the date, time, and nature of the services rendered, as well as the results achieved in order to justify the reasonableness of the fees upon request of an interested person or the Court.

## III. RIGHTS OF INTERESTED PERSONS

(An INTERESTED PERSON means an heir, legatee or a creditor who has timely presented a claim in excess of \$500 that has not been barred or discharged.)

- (a) In the absence of a waiver in a decedent's will, any interested person has the right to require the personal representative to give bond with surety approved by the Court to protect his or her interest in the estate. If a bond is waived in a decedent's will, any interested person whose interest exceeds \$1,000 has the right to request a bond.
- (b) An interested person may at any time petition the Court for an Order protecting his or her rights or to resolve questions arising in the course of a supervised or unsupervised administration.
- (c) In an unsupervised administration, an interested person may, at any time before the termination of a probate proceeding, petition the Court for supervised administration or any other court order necessary to protect the rights of the interested parties. The change from unsupervised to supervised will be prospective only.
- (d) An heir or legatee has the right to contest the validity of a will within six months of the first date of the notice of publication.
- (e) In a supervised administration, an interested person has the right to decide whether the Court should conduct a cursory review or a detailed audit of the personal representative's books and records.
- (f) In an unsupervised administration, an interested person is entitled to accountings by the personal representative at reasonable intervals and may request same upon reasonable notice to the personal representative. An interested person may also petition to compel an unsupervised Personal Representative to account to the Court.
- (g) An interested person has the right to file written objections with the Court as to:
  - (1) the contents of, or value stated in any inventory;
  - (2) the contents of any account; and
  - (3) the amounts stated for compensation for services rendered by a Personal Representative or any agent employed by the Personal Representative.
- (h) An interested person has the right to receive a copy of all documents identified in (g) above, and to request justification for fees and other actions of the personal representative and agents employed by the personal representative.
- (i) Prior to the sale or transfer of a particular piece of real or personal property, an interested person may request the Court to have a priority placed on the sale or transfer. After a hearing, the Court will decide the order in which estate property will be sold or transferred.
- (j) A person in possession of property which the person is presumptively entitled to receive at some later time as heir or legatee, may retain said property unless the Personal Representative requests possession of the property for purposes of estate administration.

- (k) An interested person has a duty to inform the Personal Representative of all matters which will aid in the administration of the estate.
- (l) Creditors must present claims within six months of the first notice of publication. See Chapter 9, Title 20 of the D.C. Code.

#### IV. ROLE OF THE REGISTER OF WILLS

- (a) The Register of Wills is the administrative officer of the Court who serves as Clerk of the Probate Division.
- (b) In a supervised administration, it is the duty of the Register of Wills to ensure that prompt and accurate reports and accounts are filed, creditors are paid, and distribution is made to the proper persons. In an unsupervised administration, the Register of Wills generally will not monitor the administration.
- (c) Any questions or information concerning the estate administration should be addressed to the Personal Representative. If an interested person is not satisfied with the response or action of the Personal Representative, the matter may be brought to the attention of the Court by filing a petition with the Register of Wills, 500 Indiana Avenue, N.W., Washington, D.C. 20001.

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_  
Deceased

### Abbreviated Probate Order

(For estates of decedents dying on or after July 1, 1995)

Upon consideration of the petition for (supervised) (unsupervised) abbreviated probate, acceptance and consent of each personal representative, a power of attorney of each non-resident, and a bond, if applicable, in the amount of \$ \_\_\_\_\_ all having been filed herein, it is by the Court this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_,

ORDERED, that administration of this estate is

(unsupervised)

(supervised) for the following reasons:

Decedent's will directs supervision.

Decedent's will directs unsupervised administration but supervised administration is required for the following reasons: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

and it is further,

ORDERED, that \_\_\_\_\_

\_\_\_\_\_ (is) (are) appointed personal representative(s) of the estate of \_\_\_\_\_, deceased, and it is further,

ORDERED, that

- the Court finds that the decedent died intestate.
- the will dated \_\_\_\_\_ and codicil(s) dated \_\_\_\_\_ accompanying the petition (is) (are) admitted to probate and record as the last will and testament of the aforesaid decedent.
- that bond heretofore filed in the amount of \$ \_\_\_\_\_ is approved.
- bond is not required.
- that the said personal representative(s) shall file an additional bond in an amount to be fixed by the Court before accepting assets in excess of the stated amount.
- the sum of \$10,000 is allowed out of the personal estate to \_\_\_\_\_ as surviving spouse and/or custodian of decedent's minor child(ren) in accordance with law.
- subject to any limitation of the will (if decedent died testate), D.C. Code Title 20, or by an order of Court, the personal representative(s) may, in addition to any power or authority contained in the will and to any other common-law or statutory power, properly exercise those general powers as enumerated in D.C. Code Section 20-741, subject to the following limitations which, if the administration is supervised, shall be endorsed on the letters of administration:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
JUDGE

cc: Include Attorney of Record and P.R.

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_  
Deceased

### Standard Probate Order

(For estates of decedents dying on or after July 1, 1995 and before April 27, 2001)

Upon consideration of the petition for (supervised) (unsupervised) standard probate, the acceptance and consent of each personal representative, a power of attorney by each non-resident, and a bond, if applicable, in the amount of \$ \_\_\_\_\_ all having been filed herein, and it further appearing that publication of notice pursuant to SCR-PD 403(a)(1) has been effected and copies of the notice were timely mailed to all interested persons or that diligent effort has been made to do so as evidenced by the verified statement filed herein, and no adverse responses having been filed, it is this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_,

ORDERED, that administration of this estate is

(unsupervised)

(supervised) for the following reasons:

Decedent's will directs supervision.

Decedent's will directs unsupervised administration but supervised administration is required for the following reasons: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

and it is further,

ORDERED, that \_\_\_\_\_

\_\_\_\_\_ (is) (are) appointed personal representative(s) of the estate of \_\_\_\_\_, deceased, and it is further,

ORDERED, that

- the Court finds that the decedent died intestate.
- the will dated \_\_\_\_\_ and codicil(s) dated \_\_\_\_\_ accompanying the petition (is) (are) admitted to probate and record as the last will and testament of the aforesaid decedent.
- that bond heretofore filed in the amount of \$ \_\_\_\_\_ is approved.
- bond is not required.
- that the said personal representative(s) shall file an additional bond in an amount to be fixed by the Court before accepting assets in excess of the stated amount.
- the sum of \$10,000 is allowed out of the personal estate to \_\_\_\_\_ as surviving spouse and/or custodian of decedent's minor child(ren) in accordance with law.
- subject to any limitation of the will (if decedent died testate), D.C. Code Title 20, or by an order of Court, the personal representative(s) may, in addition to any power or authority contained in the will and to any other common-law or statutory power, properly exercise those general powers as enumerated in D.C. Code Section 20-741, subject to the following limitations which, if the administration is supervised, shall be endorsed on the letters of administration:

\_\_\_\_\_  
JUDGE

cc: Include Attorney of Record and P.R.

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

## CONSENT TO APPOINTMENT OF PERSONAL REPRESENTATIVE

I \_\_\_\_\_, being a competent adult heir and/or legatee of \_\_\_\_\_ deceased, and being familiar with the petition of \_\_\_\_\_ for Letters of Administration, do hereby consent to the appointment of petitioner(s).

\_\_\_\_\_  
Witness

\_\_\_\_\_  
(Signature of heir or legatee)

Superior Court of the District of Columbia
PROBATE DIVISION
Washington, D.C. 20001-2131

Estate of

Administration No. \_\_\_\_\_

Deceased

BOND OF PERSONAL REPRESENTATIVE
PURSUANT TO D.C. CODE §20-502(a)

KNOW ALL BY THESE PRESENTS: That I/we \_\_\_\_\_
\_\_\_\_\_ as principal and \_\_\_\_\_ as surety, are held
and firmly bound to the District of Columbia in the sum of \_\_\_\_\_ dollars.

The condition of the above obligation is such that if the said \_\_\_\_\_ shall well and truly
perform the office of the personal representative(s) of the estate of \_\_\_\_\_
\_\_\_\_\_, deceased, late of \_\_\_\_\_
\_\_\_\_\_, according to law, and shall in all respects discharge the duties required of the personal
representative(s) by law without any injury or damage to any interested person or creditor (other than those excluded below,
if any) the above obligation shall be void; otherwise it shall be in full force and effect.

The foregoing notwithstanding, this bond shall not cover the following: \_\_\_\_\_

- the interest of the following interested persons who have filed written waivers:
the cash on deposit in an account expressly subject to withdrawal only in a manner that is approved by the Court:
the value of the following real or personal property which cannot be sold or distributed without Court authorization:

SIGNED, SEALED AND DELIVERED
IN THE PRESENCE OF:

(Seal)
(Signature lines)

Dated this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_

Surety \_\_\_\_\_
By: \_\_\_\_\_ (Seal)

Superior Court of the District of Columbia
PROBATE DIVISION
Washington, D.C. 20001-2131

Estate of

Administration No. \_\_\_\_\_

\_\_\_\_\_
Deceased

BOND OF PERSONAL REPRESENTATIVE
PURSUANT TO D.C. CODE §20-502 (a-1)
(must be filed upon demand for same and approved by the Court)

KNOW ALL BY THESE PRESENTS: That I/we \_\_\_\_\_
\_\_\_\_\_ as principal and
\_\_\_\_\_ as surety, are held and firmly bound to the
District of Columbia for the use of (person(s) and/or creditor(s) demanding bond)\_\_\_\_\_
\_\_\_\_\_ in the sum of
\_\_\_\_\_ dollars.

The condition of the above obligation is such that if the said \_\_\_\_\_
\_\_\_\_\_ shall well and truly perform the office of the personal representative(s) of the estate
of \_\_\_\_\_, deceased, late of
\_\_\_\_\_ according to law, and shall in all respects
discharge the duties required of the personal representative(s) by law without any injury or damage to the interest of the
person(s) or creditor(s) listed above, said obligation shall be void: otherwise it shall be in full force and effect for the use of
said above-named person(s) or creditor(s), and none other.

SIGNED, SEALED AND DELIVERED
IN THE PRESENCE OF:

\_\_\_\_\_ (Seal)
\_\_\_\_\_
\_\_\_\_\_ (Seal)
\_\_\_\_\_
\_\_\_\_\_ (Seal)
\_\_\_\_\_

Dated this \_\_\_\_\_ day of
\_\_\_\_\_, \_\_\_\_\_

Surety \_\_\_\_\_
By: \_\_\_\_\_ (Seal)

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

## PETITION FOR PERSONAL REPRESENTATIVE'S BOND PURSUANT TO D.C. CODE §20-502 (a-1)

I, \_\_\_\_\_ certify that I am

a person having an interest in the above estate worth in excess of \$1,000.00, which consists of  
(specify nature of interest) \_\_\_\_\_ or

a creditor having a claim in excess of \$1,000.00,

and demand that \_\_\_\_\_

\_\_\_\_\_, Personal Representative(s) of the estate, give bond  
for my use and benefit in the amount of \$ \_\_\_\_\_ .

\_\_\_\_\_  
Signature of person or creditor, or person authorized  
to make demand on behalf of creditor

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

### INSTRUCTIONS

**This form must be filed with the Register of Wills and a copy mailed to the Personal Representative(s) (or if none has been appointed, the person(s) whose appointment as Personal Representative(s) was requested on the Petition for Probate). Upon request for a bond, the Court may set a hearing to determine if a bond is required.**

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

## WAIVER OF PERSONAL REPRESENTATIVE'S BOND

I, \_\_\_\_\_, being a competent

adult heir and/or legatee of \_\_\_\_\_, deceased, or

a creditor of the decedent whose claim in excess of \$500.00 has not been barred or discharged,

and being familiar with the petition of \_\_\_\_\_  
for Letters of Administration, do hereby waive protection of any bond so far as my interest in said estate is  
concerned.

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Signature

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

## NOTICE OF STANDARD PROBATE

Estate of \_\_\_\_\_  
Deceased

Administration No. \_\_\_\_\_

Notice is hereby given that a petition has been filed in this Court by \_\_\_\_\_ for standard probate, including the appointment of one or more personal representatives. Unless a complaint or an objection in accordance with Superior Court Probate Division Rule 407 is filed in this Court within 30 days from the date of first publication of this notice, the Court may take the action hereinafter set forth.

(Delete all which do not apply)

- admit to probate the will dated \_\_\_\_\_ exhibited with the petition upon proof satisfactory to the Court of due execution by affidavit of witnesses
- order witnesses to the alleged will dated \_\_\_\_\_ to appear and give testimony regarding its execution
- order \_\_\_\_\_ who is alleged to have custody of the will dated \_\_\_\_\_ to deliver it to the Court
- order any interested person to show cause why the provisions of the lost or destroyed will dated \_\_\_\_\_ should not be admitted to probate as expressed in the petition
- in the absence of a will or proof satisfactory to the Court of due execution, enter an order determining that the decedent died intestate
  - appoint an unsupervised personal representative
  - appoint a supervised personal representative
  - (other) \_\_\_\_\_

Date of first publication: \_\_\_\_\_

Names of newspapers: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Signature of Petitioner/Attorney

\_\_\_\_\_  
Register of Wills  
Clerk of the Probate Division

\_\_\_\_\_  
Address & Phone No.

**Superior Court of the District of Columbia**  
**PROBATE DIVISION**  
**Washington, D.C. 20001-2131**

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Name of decedent

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Name and Address of Attorney

**NOTICE OF APPOINTMENT, NOTICE TO CREDITORS  
AND NOTICE TO UNKNOWN HEIRS**

\_\_\_\_\_, whose  
address(es) (is/are) \_\_\_\_\_

\_\_\_\_\_, (was/were) appointed personal  
representative(s) of the estate of \_\_\_\_\_, who died

on \_\_\_\_\_ (with/without) a will, and will serve (with/without)

Court supervision. All unknown heirs and heirs whose whereabouts are unknown shall enter their  
appearance in this proceeding. Objections to such appointment (or to the probate of decedent's will) shall be filed  
with the Register of Wills, D.C., 500 Indiana Avenue, N.W., Washington, D.C. 20001, on or before

\_\_\_\_\_. Claims against the decedent shall be presented to the  
undersigned with a copy to the Register of Wills or filed with the Register of Wills with a copy to the undersigned,  
on or before \_\_\_\_\_, or be forever barred. Persons believed to be

heirs or legatees of the decedent who do not receive a copy of this notice by mail within 25 days of its first  
publication shall so inform the Register of Wills, including name, address and relationship.

Date of first publication:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
To be signed by Personal Representative(s)

Name of newspaper:

\_\_\_\_\_  
Telephone number of Personal Representative(s)

**TRUE TEST COPY**

\_\_\_\_\_

\_\_\_\_\_

**REGISTER OF WILLS**

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

### VERIFICATION AND CERTIFICATE OF NOTICE BY PERSONAL REPRESENTATIVE PURSUANT TO SCR-PD 403(b)(4)

I do solemnly declare and affirm that I have mailed or caused to be mailed a copy of the notice of appointment and general information statement as required in D.C. Code §20-704 (a) and (b) on the \_\_\_\_\_ day of \_\_\_\_\_, to the following persons:

**List names and addresses of all heirs, legatees, and creditors referred to in D.C. Code §20-704(b)**  
**(Attach additional sheets, if necessary.)**

I do further solemnly declare and affirm that I have previously filed or file herewith proofs of publication as required by SCR-PD 403 (b) (4), and that to the best of my knowledge and belief the value of the probate estate (remains the same as) (increased/decreased in the following amount from) that set forth in the petition for probate previously filed with the Court. ( \$ \_\_\_\_\_ ); and that I have paid or tender herewith court costs pursuant to SCR-PD 425(a)(1) through (4) and in accordance with D.C. Code §15-707(a).

Dated: \_\_\_\_\_

\_\_\_\_\_

Attorney: \_\_\_\_\_

\_\_\_\_\_

Personal Representative(s)

**Instructions for Filing**  
**“Verification and Certificate of Notice by Personal Representative Pursuant to SCR-PD 403(b)(4)”**  
**Certificate of Notice, (WLR Form 809)**

(For estates of decedents dying on or after July 1, 1995 and whose estates are unsupervised\*)

**Overview:**

The purpose of this form is to certify to the Register of Wills for the record that all heirs, all legatees (persons who take under a will) and all creditors have received notice of the probate proceedings.

**When the notice must be given:**

A copy of the General Information Sheet (covered below) and the Form 808, Notice of Appointment, Notice to Creditors and Notice to Unknown Heirs (also covered below) must be mailed to all creditors, heirs and legatees within twenty (20) days of the date of the order appointing the personal representative.

**How the Notice must be mailed:**

The notices must be sent by registered or certified mail, postage prepaid, return receipt requested, to the last known address, with delivery restricted to the addressee. Currently, the filing of the green return receipts is optional.

**When the Certificate of Notice (Form 809) must be filed:**

The Certificate of Notice must be filed with the Court within ninety (90) days of the date of the Order appointing the personal representative.

**Newspaper Notice:**

Upon acceptance of your petition for probate by the Office of the register of Wills (hereinafter “Office”), the Office will return to one copy of Form 808, Notice of Appointment, Notice to Creditors and Notice to Unknown Heirs with the initial publication date stamped on it. You must mail a copy of that notice to all creditors and to each heir and legatee. The two newspapers will bill you for the costs of publication. Upon receipt of your payment, they will send you a Proof of Publication which will bear a raised seal. You must file these original Proofs of Publication along with Form 809 Certificate of Notice. The Certificate of Notice (Form 809) will not be accepted for filing without the Proofs of Publication.

**General Information for Heirs, Legatees, and Creditors (General Information Sheet):**

With the package that you received from The Washington Law Reporter Company, you received the General Information Sheet. You are required to send a copy of this sheet along with the above notice (Form 808) to all creditors and to each heir and legatee.

**Creditors:**

In the space provided in the Certificate of Notice (Form 809), you must list the names of each creditor of the decedent. The notices must be sent to any creditor whose identity is known or discoverable through reasonably diligent effort.

**\* Supervised Estates:**

These instructions also apply to supervised estates with the exception that Form 809 is not used. Instead, Form 810 “Inventory” is used. In such cases the required information must be provided on the “Verification and Certificate” on the reverse side of the Inventory.

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

Deceased

Date of Death \_\_\_\_\_

Date of Appointment of  
Personal Representative \_\_\_\_\_

Supervised estate       Unsupervised estate

NOTICE is hereby given that the supervised personal representative of the above estate will file the enclosed Inventory with the Court on or before \_\_\_\_\_

(Fill in date within 3 months from date of appointment)

## INVENTORY Summary

Schedule	Type of Property	Appraised Value
A	Real property in the District of Columbia	\$ _____
B	Tangible personal	_____
C	Corporate Stocks	_____
D	Bonds, notes, mortgages, debts due to the decedent	_____
E	Bank accounts, building association shares, savings and loan accounts, cash	_____
F	Debts owed to the decedent by the personal representative	_____
G	All other interests	_____
TOTAL \$		_____

**Instructions: Complete all pertinent schedules and summary. See D.C. Code §§20-711 and 712.**

## VERIFICATION

I do solemnly declare and affirm under penalty of law that the contents of this inventory are true and correct to the best of my knowledge, information, and belief, that it has been prepared by me or under my direction, and is to the best of my knowledge a complete inventory of all of the estate of the above named decedent, made in good faith pursuant to District of Columbia law.

\_\_\_\_\_

\_\_\_\_\_  
Personal Representative(s)

**CERTIFICATE**

There has been mailed or delivered to all interested persons, within the 15 days previous to the filing of this inventory, a copy of the inventory and the appended notice that it would be filed on or before the date stated in said notice.

Date: \_\_\_\_\_

\_\_\_\_\_  
Personal Representative(s)  
or Attorney(s)

**VERIFICATION AND CERTIFICATE  
PURSUANT TO SCR-PD 403 (b) (4)**

I do solemnly declare and affirm that I have mailed or caused to be mailed a copy of the notice of appointment and general information statement as required in D.C. Code §20-704 (a) and (b) on the \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, to the following persons:

**List of names and addresses of all heirs, legatees, and creditors referred to in D.C. Code §20-704(b)**  
**(Attach additional sheets if necessary)**

I do further solemnly declare and affirm that I have previously filed or file herewith proofs of publication as required by SCR-PD 403 (b) (4), and that to the best of my knowledge and belief the value of the probate estate (remains the same as) (increased/decreased in the following amount from) that set forth in the petition for probate previously filed with the Court. ( \$ \_\_\_\_\_ ); and that I have paid court costs or tender herewith court costs pursuant to SCR-PD 425(a)(1) through (4) and in accordance with D.C. Code §15-707(a).

Dated: \_\_\_\_\_

Attorney: \_\_\_\_\_

\_\_\_\_\_  
Personal Representative(s)

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

## INVENTORY SCHEDULE ( )

### USE A SEPARATE SHEET FOR EACH SCHEDULE

Include a description of the type and amount of any encumbrance but do not deduct it from value column.

Item No.	Description	Value
----------	-------------	-------

TOTAL \$ \_\_\_\_\_

### Appraiser's Verification

The property described above has been impartially appraised by me to the best of my skill and judgment and constitutes all of the property of the named decedent of the type encompassed by this schedule of which I have knowledge and with the appraisal of which I have been charged.

Appraiser \_\_\_\_\_  
(Print name)

Appraiser \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Address)

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

Deceased

## PETITION FOR ORDER DIRECTING PAYMENT OF CLAIM PURSUANT TO D.C. CODE §20-909(a)

The undersigned claimant hereby petitions the Court for an order directing payment of a claim against the above-entitled estate.

1. Name of claimant: \_\_\_\_\_

2. Address of claimant: \_\_\_\_\_

3. Date of mailing or delivery of claim to Register of Wills or Personal Representative: \_\_\_\_\_

4. Amount of claim: \_\_\_\_\_

5. Basis of claim (check appropriate lien):

- Funeral expenses, not exceeding \$1,500.
- Family allowance, not exceeding \$10,000.
- Rent in arrears for which an attachment might be levied by law.
- Judgments and decrees of courts in the District of Columbia.
- Other just claims.

6. The petition is being filed because the claim has not been rejected but has not been paid within 8 months from the date of first publication of the Notice of Appointment Notice to Creditors and Notice to Unknown Heirs.

7. The time for presentation of claims has expired.

I do solemnly declare and affirm under penalty of law that the contents of the foregoing petition are true and correct to the best of my knowledge, information and belief.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Claimant

### CERTIFICATE OF SERVICE

I hereby certify that a copy of the foregoing Petition for Order Directing Payment of Claim Against Estate Pursuant to D.C. Code §20-909(a) was this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, mailed, by first class mail, postage prepaid, (or delivered) to \_\_\_\_\_

\_\_\_\_\_  
(Personal Representative or Attorney for the Personal Representative)

\_\_\_\_\_  
Signature of Claimant or Claimant's Attorney

**Superior Court of the District of Columbia**  
**PROBATE DIVISION**  
**Washington, D.C. 20001-2131**

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

**NOTICE OF ACTION TAKEN ON CLAIM**

To: \_\_\_\_\_  
Claimant

You are hereby notified that your claim in the amount of \$ \_\_\_\_\_ against the above-entitled estate is: (check appropriate box)

- Allowed in the stated amount.
- Allowed in the amount of \$ \_\_\_\_\_
- Disallowed.
- Undetermined, and will be presented to the Court for determination.

\_\_\_\_\_  
Personal Representative(s)

Date mailed or delivered: \_\_\_\_\_

**NOTICE**

If your claim has been disallowed in whole or in part, it will be barred to the extent of its disallowance unless you file a verified complaint with the appropriate Division of this Court or other court of competent jurisdiction within 60 days after the date of mailing or delivery of this notice or such shorter period as might be allowed by the regular statute of limitations.

**Superior Court of the District of Columbia**  
**PROBATE DIVISION**  
**Washington, D.C. 20001-2131**

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

**REQUEST FOR EXTENSION OF  
PERSONAL REPRESENTATIVE'S APPOINTMENT  
(Unsupervised)**

(I) (We), \_\_\_\_\_,  
the personal representative(s) of the estate of \_\_\_\_\_ deceased, hereby  
represent(s) to the Court as follows:

- (a) No Certificate of Completion has been filed herein;
- (b) Said unsupervised personal representative(s) (was) (were) so appointed by the Court on \_\_\_\_\_  
\_\_\_\_\_ and said appointment, as most recently extended (if at all),  
will expire on \_\_\_\_\_ unless (further) extended by the Court; and
- (c) The administration of said decedent's estate will not have been completed by such termination date  
because \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Accordingly, the personal representative(s) request(s) that (his) (her) (its) (their) appointment be extended for  
an additional twelve months, beginning on the expiration date as shown in paragraph (b) above.

\_\_\_\_\_  
\_\_\_\_\_  
Personal Representative(s)

Dated: \_\_\_\_\_

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

## ORDER EXTENDING APPOINTMENT OF PERSONAL REPRESENTATIVE(S) (Unsupervised)

Upon consideration of the written request filed herein by \_\_\_\_\_  
\_\_\_\_\_, personal representative(s) of the estate  
of \_\_\_\_\_, deceased, for an extension of the appointment of  
the personal representative(s), it is by the Court this \_\_\_\_\_ day of \_\_\_\_\_,  
\_\_\_\_\_.

ORDERED, that the appointment of \_\_\_\_\_ as the  
unsupervised personal representative(s) of the estate of \_\_\_\_\_,  
deceased, be and hereby is

extended, and the estate shall remain open, for a period of twelve months from \_\_\_\_\_  
\_\_\_\_\_, unless otherwise terminated hereafter.  
former date of termination

or

extended, for a period of twelve months from the date of this order unless otherwise terminated  
hereafter, nunc pro tunc from \_\_\_\_\_, and the estate  
former date of termination  
shall be deemed to have remained open continuously from that date.

\_\_\_\_\_  
JUDGE

Copies to:

(Insert list of names and addresses of all interested persons. Attach additional sheet if necessary.)

\_\_\_\_\_  
\_\_\_\_\_

Superior Court of the District of Columbia
PROBATE DIVISION
Washington, D.C. 20001-2131

Estate of

Administration No. \_\_\_\_\_

Deceased

WAIVER OF FILING INVENTORIES AND ACCOUNTS

- I am an heir/legatee of the above-captioned estate. I am aware of my right to require the filing of inventories and accounts with the Court, but I waive this right, knowing that I may revoke this waiver and require the filing of an inventory and accounts by filing a written demand with the Register of Wills within 7 days of sending the final account to the interested persons. I further understand that if all heirs or legatees file Waivers of Filing Inventories and Accounts, this estate will be converted to unsupervised administration.
I am the personal representative and the decedent's will waives the filing of Inventories and Accounts.

Date: \_\_\_\_\_

Signature

- The Verification and Certificate Pursuant to Rule 403(b)(4) was filed \_\_\_\_\_, or Insert Date
The Verification and Certificate Pursuant to Rule 403(b)(4) is filed below.

VERIFICATION AND CERTIFICATE BY SUPERVISED PERSONAL REPRESENTATIVE PURSUANT TO SCR-PD 403(b)(4)

I do solemnly declare and affirm that I have mailed or caused to be mailed a copy of the notice of appointment and general information statement as required in D.C. Code §20-704 (a) and (b) on the \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, to the following persons:

Attach separate sheet with list of names and addresses of all heirs, legatees, and creditors referred to in D.C. Code §20-704(b)

I do further solemnly declare and affirm that I have previously filed or file herewith proofs of publication as required by SCR-PD 403(b)(4), and to the best of my knowledge and belief the value of the probate estate (remains the same as) (increased/decreased in the following amount from) that set forth in the petition for probate previously filed with Court. (\$ \_\_\_\_\_); and that I have paid or tender herewith court costs pursuant to SCR-PD 425(a)(1) through (4) and in accordance with D.C. Code §15-707(a).

Dated: \_\_\_\_\_

Personal Representative(s)

Attorney: \_\_\_\_\_

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

## NOTICE ACCOMPANYING FINAL ACCOUNT OF :

Check Appropriate Box

**SUPERVISED PERSONAL REPRESENTATIVE**

Enclosed with this notice is a copy of the final account of the supervised personal representative(s) of the above captioned decedent's estate.

You should understand that:

1. You have a right to object to this account within thirty days after the date on which this account was sent to you, by mailing or delivering the Probate Division of the Superior Court of the District of Columbia and a copy to the personal representative within that 30-day period a written statement specifying your particular objections to the account as stated; and
2. If you do not make such an objection within the time prescribed, all claims (other than for fraud) which you may have against the personal representative(s) or any distributee shall be barred.

**UNSUPERVISED PERSONAL REPRESENTATIVE**

Enclosed with this notice is a copy of the final account of the unsupervised personal representative(s) of the above captioned decedent's estate.

You should understand that:

1. You have a right to object to this account within sixty days after the date on which this account was sent to you, by mailing or delivering to the personal representative or the Probate Division of the Superior Court of the District of Columbia within that 60-day period a written statement specifying your particular objections to the account as stated; and
2. If you do not make such an objection within the time prescribed, all claims (other than for fraud) which you may have against the personal representative(s) or any distributee shall be barred.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Personal Representative(s) or Counsel for Personal Representative(s)

**Superior Court of the District of Columbia**  
**PROBATE DIVISION**  
**Washington, D.C. 20001-2131**

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

**WAIVER OF FORMAL AUDIT OF ACCOUNT  
AND CONSENT TO ACCOUNT AS STATED**

I, \_\_\_\_\_, am entitled to receive a share of the above estate. I have received a copy of the \_\_\_\_\_ account of the estate. (first, second and final, etc.)

I am aware that I am entitled to have a complete audit by the Court of said account whereby all the books and records of the Personal Representative would be examined.

I hereby waive my right to a formal audit and my right to file exceptions to the account within 30 days. I authorize the Court to conduct an informal and cursory review of limited records submitted by the Personal Representative.

I am aware that I may later request a formal and complete Court audit by filing a written demand with the Register of Wills within 20 days of the approval of the final account.

Witness:  
(one required)

\_\_\_\_\_

\_\_\_\_\_

(Signature)

\_\_\_\_\_

Dated: \_\_\_\_\_

(Address)

\_\_\_\_\_

**This Waiver does not constitute a consent to the commission or fee requested, if any.**

Superior Court of the District of Columbia
PROBATE DIVISION
Washington, D.C. 20001-2131

Estate of

Administration No. \_\_\_\_\_

Deceased

CONSENT TO ACCOUNT
IN UNSUPERVISED ADMINISTRATION

I, \_\_\_\_\_, am entitled to receive a share of the
above estate. I have received a copy of the \_\_\_\_\_ account of
the estate. (first, second and final, etc.)

I am aware that I have the right to object to the account within sixty days after the date on which the account
was sent to me.

I am also aware that if I do not make such an objection within the sixty day period, all claims (other than fraud)
which I may have against the personal representative(s) or any distributee shall be barred.

I hereby waive my right to file objections to the account, and do consent to the account as stated..

Witness:
(one required)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Dated: \_\_\_\_\_
(Signature)

(Address)

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

## PETITION FOR TERMINATION OF APPOINTMENT OF SUPERVISED PERSONAL REPRESENTATIVE

Pursuant to D.C. Code §20-1301 \_\_\_\_\_, the personal representative(s) of the above estate, request(s) termination of appointment as personal representative(s), and in support thereof, represent(s) to the Court as follows:

1. \_\_\_\_\_, (was) (were) appointed personal representative(s) of the above estate by order of this Court entered \_\_\_\_\_ and (is) (are) currently so serving in supervised administration.

2. A request for termination of this appointment (has) (has not) previously been made on the final account approved by this Court (with) (without) formal audit.

3. All creditors' claims have been resolved in accordance with applicable law.

4. The Court has approved the final account of the personal representative(s), and all estate assets have been distributed as stated in that account.

5. Unless previously filed, there are attached to this petition, receipts signed by all of the (heirs) (legatees) of this estate, who are listed below, which receipts reflect all distributions reported in accounts previously approved by this Court:

**List names of (heirs) (legatees). Attach additional sheet if necessary.**

Wherefore, the personal representative(s) pray(s) for termination of appointment in this estate.

The undersigned personal representative(s) of the estate of \_\_\_\_\_ , deceased, solemnly declare(s) and affirm(s) under penalty of law that the contents of the foregoing document are true and correct to the best of the personal representative's knowledge, information and belief.

Dated: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Personal Representative(s)

**CERTIFICATE OF SERVICE**

I hereby certify that a copy of the foregoing Petition for Termination of Appointment of Supervised Personal Representative has been mailed, postage prepaid, to all [heirs/residuary legatees] and to all creditors who have presented their claims but have not been paid in full, and who are listed below, at their last known addresses, this \_\_\_\_\_ day of \_\_\_\_\_ , \_\_\_\_\_ .

**List names of heirs/residuary legatees and unpaid creditors**

\_\_\_\_\_  
Personal Representative(s)

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

## ORDER TERMINATING APPOINTMENT OF SUPERVISED PERSONAL REPRESENTATIVE(S)

Upon consideration of the petition for termination of the appointment of \_\_\_\_\_  
\_\_\_\_\_ as supervised personal representative(s)  
of the estate of the above-captioned decedent, pursuant to D.C. Code §20-1301, and it appearing to the satisfac-  
tion of the Court that all necessary receipts of heirs or legatees have been filed, that due notice of this petition has  
been given to all residuary legatees or heirs and all creditors who have presented their claims but have not been  
paid in full and that no objection has been filed, it is by the Court this \_\_\_\_\_ day of  
\_\_\_\_\_, \_\_\_\_\_,

ORDERED that the appointment of \_\_\_\_\_  
\_\_\_\_\_ as the supervised personal representative(s) of the estate  
of \_\_\_\_\_ be and the same hereby is terminated.

\_\_\_\_\_  
JUDGE

Copies to :  
  
\_\_\_\_\_

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

\_\_\_\_\_  
Deceased

## CERTIFICATE OF COMPLETION (Unsupervised)

(I) (We), \_\_\_\_\_, personal representative(s) of the estate of the above captioned decedent's estate, do hereby certify that:

1. The time for the presentation of creditors' claims has expired;
2. All interested persons have been sent a copy of the final account and a notice (a copy of which notice is attached hereto) of each one's right to object within 60 days after such account was sent, and that all claims of that interested person against the personal representative shall be barred unless such an objection is made;
3. Either each interested person has consented in writing to the account as stated, or there was no written objection within the 60-day period described above;
4. Distribution has been made in accordance with such account;
5.  All known claims of creditors which are not barred have been fully satisfied or otherwise settled; or  
 If any claim remains undischarged, attach a description of each such claim (including the name and address of the creditor, and the nature and amount of the claim), and indicate for each that either:
  - (a) The personal representative has distributed the estate subject to possible liability on the part of the distributees with the agreement of those distributees; or
  - (b) Other arrangements have been made to accommodate all such outstanding liabilities, as set forth in the following detailed explanation: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
6. The personal representative has satisfied all administration expenses and other obligations of the estate incurred or authorized by the personal representative, and has otherwise fully administered the estate; and
7. Federal and D.C. estate tax returns are:
  - Not required to be filed; or
  - Required and have been filed, and the taxes shown on those returns, including all applicable interest, either:
    - are not due; or
    - Have been paid in full;

and the Internal Revenue Service closing letter:

has  has not been received;

and the Certificate of D.C. Department of Finance and Revenue:

has  has not been received; or

(I) (We) (do) (do not) hereby request termination of (my) (our) appointment as personal representative(s) of said decedent's estate pursuant to D.C. Code §20-1301(b).

(I) (We) do solemnly declare and affirm under penalty of law that the contents of the foregoing Certificate of Completion are true and correct to the best of (my) (our) knowledge, information, and belief.

\_\_\_\_\_

\_\_\_\_\_  
Personal Representative(s)

Dated: \_\_\_\_\_

### CERTIFICATE OF SERVICE

I \_\_\_\_\_, (a) (the) personal representative of the estate of \_\_\_\_\_, deceased, do hereby certify that I have caused to be mailed, postage prepaid, to each of the persons and entities listed below, on \_\_\_\_\_, \_\_\_\_\_, a copy of the final account and the corresponding notice described above, as well as a copy of this Certificate of Completion on \_\_\_\_\_, \_\_\_\_\_:

#### List Names And Addresses

Dated: \_\_\_\_\_

\_\_\_\_\_  
Personal Representative(s)

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

Foreign No. \_\_\_\_\_

\_\_\_\_\_  
Date of Death

\_\_\_\_\_  
Name of Decedent

## NOTICE OF APPOINTMENT OF FOREIGN PERSONAL REPRESENTATIVE AND NOTICE TO CREDITORS

\_\_\_\_\_ whose address is  
\_\_\_\_\_ was appointed personal representative of the estate  
of \_\_\_\_\_, deceased, on \_\_\_\_\_,  
by the \_\_\_\_\_ Court for \_\_\_\_\_ County, State of  
\_\_\_\_\_.

Service of process may be made upon \_\_\_\_\_

\_\_\_\_\_  
(insert name and address)

whose designation as District of Columbia agent has been filed with the Register of Wills, D.C.

The decedent owned the following District of Columbia real property: (Strike preceding sentence if no real estate.) \_\_\_\_\_

The decedent owned District of Columbia personal property. (Strike preceding sentence if no personal property.) Claims against the decedent may be presented to the undersigned and filed with the Register of Wills for the District of Columbia, 500 Indiana Avenue, N.W., Washington, D.C. 20001 within 6 months from the date of first publication of this notice. (Strike preceding sentence if no real estate.)

Date of first publication:

\_\_\_\_\_

Name of newspaper and/or periodical:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Personal Representative(s)

\_\_\_\_\_  
Telephone number(s)

\_\_\_\_\_  
TRUE TEST COPY

\_\_\_\_\_  
REGISTER OF WILLS

Superior Court of the District of Columbia
PROBATE DIVISION
Washington, D.C. 20001-2131

Estate of

Administration No. \_\_\_\_\_

\_\_\_\_\_
Deceased

APPOINTMENT OF AGENT TO ACCEPT SERVICE OF PROCESS

I \_\_\_\_\_, personal representative of the
estate of \_\_\_\_\_, deceased do hereby designate
\_\_\_\_\_ as my agent, in the District of Columbia, with the mailing address
shown below, on whom service of process may be made in like manner and with like effect as if it were personally
served on me.

AS WITNESS my hand and seal this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_
Personal Representative(s)

\_\_\_\_\_
Address

Signature of Agent in the District of Columbia
District of Columbia mailing address of Agent

# Superior Court of the District of Columbia

PROBATE DIVISION  
Washington, D.C. 20001-2131

## Statement of Account

Estate of \_\_\_\_\_

Administration No. \_\_\_\_\_

Deceased

Docket \_\_\_\_\_

Date of death \_\_\_\_\_

Date of Appointment of  
Personal Representative \_\_\_\_\_

supervised administration

unsupervised administration

ACCOUNT OF \_\_\_\_\_

First and Final, Second, etc.

\_\_\_\_\_, Personal Representative(s)

For period beginning \_\_\_\_\_, \_\_\_\_\_ and ending \_\_\_\_\_, \_\_\_\_\_

(The first accounting period begins at the date of death of the decedent.)

CURSORY REVIEW

Yes

Waivers of formal court audit filed pursuant to D.C. Code §20-732

No

Purpose of Account: The personal representative offers this account to comply with the provisions of D.C. Code 20-721 through 20-725, D.C. Code 20-734, Court Rule 114, 119, 414 or 419 as applicable; and to acquaint interested persons with the transactions that have occurred during his or her administration. It is important that the account be carefully examined.

**SEE NOTICE TO INTERESTED PERSONS ON SHEET 15 HEREIN.**

Personal Representative: \_\_\_\_\_

Counsel: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone No.: \_\_\_\_\_

Telephone No.: \_\_\_\_\_

**See Instructions For Computing Court Costs On Reverse**

**INSTRUCTIONS FOR COMPUTING COURT COSTS**

Court costs are based on the value of all personal assets reported in Schedules A through E. The court costs are assessed at the following rates:

**DECEDENTS DYING BEFORE JULY 1, 1995  
PURSUANT TO SCR-PD-125**

Value of Probate Estate	Court Costs
\$ 10,000.01 but less than \$ 25,000	\$ 75
\$ 25,000.01 but less than \$ 50,000	\$ 125
\$ 50,000.01 but less than \$ 75,000	\$ 200
\$ 75,000.01 but less than \$ 100,000	\$ 300
\$ 100,000.01 but less than \$ 500,000	\$ 500
\$500,000.01 but less than \$ 750,000	\$ 750
\$750,000.01 but less than \$1,000,000	\$1,200
\$1,000,000.01 but less than \$2,500,000	\$2,700
\$2,500,000.01 but less than \$5,000,000	\$2,200
\$5,000,000.01 and over	\$2,200
	plus 0.02% of excess over \$5,000,000

**DECEDENTS DYING ON OR AFTER JULY 1, 1998  
PURSUANT TO SCR-PD-425**

Value of Probate Estate	Court Costs
Under \$500	No Cost
\$500.01 to \$2,500	\$15
\$2,500.01 to \$15,000	\$50
\$15,000.01 but less than \$25,000	\$100
\$ 25,000 but less than \$50,000	\$150
\$ 50,000 but less than \$75,000	\$250
\$ 75,000 but less than \$100,000	\$350
\$ 100,000 but less than \$500,000	\$575
\$ 500,000 but less than \$750,000	\$825
\$ 750,000 but less than \$1,000,000	\$1,275
\$1,000,000 but less than \$2,500,000	\$1,800
\$2,500,000 but less than \$5,000,000	\$2,300
\$5,000,000 and over	\$2,300
	plus 0.02% of excess over \$5,000,000

Additional court costs totaling \$25.00 are assessed when real property, of whatever value, irrespective of the number of parcels, is carried as a probate asset. Example:

Total value of all assets reported on Schedules A - E	\$145,343.00
Less inventoried value of real property-65,000.00	
\$ 80,343.00	
Court costs on personal assets of \$ 80,343.00	\$300.00
Court costs on real assets of \$ 65,000.00	+ 25.00
Total court costs	\$325.00

If the real estate is sold by the Personal Representative, the \$25.00 assessment is eliminated, and court costs are assessed against the proceeds of sale, as personalty, as follows:

Total value of all assets reported on Schedules A-E	
(includes proceeds of sale of real estate)	\$145,343.00
Total court costs on assets of \$145,343.00	\$500.00

Court costs are to be paid at the time of filing the first account; in later accounts, it is necessary to pay additional costs resulting from additional assets and increases reported therein. Costs paid are not refunded for later reductions in value of assets. Checks should be made payable to Register of Wills, D.C., and should be dated within 30 days of presentation. Costs should be reported on Schedule "G".

Please complete the following:

Decedent's final income taxes are:

- paid
- not paid, because

Fiduciary income taxes with respect to income received by the estate are:

- paid
- not paid, because

Unless otherwise shown in the account, list the name of any beneficiary who:

- is *not* an adult, or is under any other legal disability;
- died after decedent;
- predeceased decedent;

SUMMARY OF TRANSACTIONS

SUMMARY OF TRANSACTIONS	Debit(s) (Receipts)	Credit(s) (Disbursements)
<b>Receipts:</b>		
Total from Schedule "A"		
Beginning Balance - Principal		
(for interim accounts only) Income .....	\$	
Total from Schedule "B"		
Other collections - Principal .....		
Total from Schedule "C" (Column 1)		
Increases in assets; Changes in form .....		
Total from Schedule "D"		
Dividend and Interest Income .....		
Total from Schedule "E"		
Miscellaneous Income .....		
<b>Disbursements:</b>		
Total from Schedule "C" (Column 2)		
Decreases in assets; Losses .....		\$
Total from Schedule "F"		
Administration - Principal .....		
Total from Schedule "G"		
Disbursements - Principal .....		
Total from Schedule "H"		
Administration Expenses - Income .....		
Total from Schedule "I"		
Distribution of Principal .....		
Total from Schedule "J"		
Distributions of Income .....		
Total from Schedule "K"		
Undistributed Assets .....		
<b>Totals (Columns must agree)</b>	\$	\$

**SCHEDULE "A"**  
**BEGINNING BALANCE**

List below the assets held at the beginning of the accounting. In the First Account, report the total value of assets as shown in the inventories and appraisals made prior to the date of the account (in an interim account, report the carrying value of assets listed in the prior account from Schedule K).

Example:

	Appraised or Carrying Value
Assets per inventories filed	\$146,938.23

NOTE: APPRAISALS AND INVENTORIES ARE ON FILE WITH THE OFFICE OF THE REGISTER OF WILLS, WHERE THEY ARE OPEN TO PUBLIC INSPECTION

	Appraised or Carrying Value
PRINCIPAL	\$
Sub-total, Principal	\$
INCOME (for interim accounts only — balance forward from last account)	
If continuation sheet(s) are used, enter total of same here	\$
Total (carry forward to summary)	\$

SCHEDULE "B"—OTHER COLLECTIONS

**SCHEDULE "B"**  
**OTHER COLLECTIONS**

List in detail below the source(s) and amount(s) of all other collections not appropriate for inclusion in Schedules A, C, D or E. This would include cash advances, insurance, reimbursements, refunds, additional assets such as settlements of civil actions, etc. Assets due but not received should be identified as assets receivable.

	Receipts
	\$
If continuation sheet(s) are used, enter total of same here	\$
Total (carry forward to summary)	\$



SCHEDULE "D"—DIVIDEND AND INTEREST INCOME

SCHEDULE "D"  
**DIVIDEND AND INTEREST INCOME**

List below the source of each dividend or interest payment received, the amount of same, and the date of payment or receipt.

Example:

ABC Bank;

March 31, 19 \_\_\_\_

\$ 30.00

June 30, 19 \_\_\_\_

30.00

Sept. 30, 19 \_\_\_\_

30.00

Dec. 31, 19 \_\_\_\_

40.00

\$ 130.00

	Receipts
	\$
If continuation sheet(s) are used, enter total of same here	\$
Total (carry forward to summary)	\$

SCHEDULE "E"—MISCELLANEOUS INCOME  
 (including rents and royalties)

SCHEDULE "E"  
**MISCELLANEOUS INCOME**  
 (including rents and royalties)

List below each parcel of real estate, or rental unit, the period covered, the gross rent collections and the amount of same. If the property is not rented or was only partially rented, please indicate and explain the reason(s) therefor. Also report all royalty income received.

Example:

1111-99th Street, for the months of  
 June 19 \_\_\_\_ through May 19 \_\_\_\_, 12 months at \$300.00 \$3,600.00

	Receipts
	\$
If continuation sheet(s) are used, enter total of same here	\$
Total (carry forward to summary)	\$

SCHEDULE "F"—PRINCIPAL ADMINISTRATION EXPENSES

SCHEDULE "F"

**PRINCIPAL ADMINISTRATION EXPENSES**

(Use Schedule "H" for administration expenses allocable to  
Income in those cases in which the Will creates a trust.)

List below all expenses which arose after the death of the decedent in connection with the settlement of the estate. These include: attorney's fees; personal representative's compensation, bond premiums, bank service charges, court costs, fiduciary income taxes, federal estate taxes and inheritance taxes (if authorized by the Will), publication costs, investment advisor fees, attorney's and personal representative's out-of-pocket expenses, etc.

	Disbursements
	\$
If continuation sheet(s) are used, enter total of same here	\$
Total (carry forward to summary)	\$

SCHEDULE "G"—PRINCIPAL DISBURSEMENTS

SCHEDULE "G"  
PRINCIPAL DISBURSEMENTS

List below all disbursements which are not previously reported on Schedules F or H including a brief description as to the nature of payment. Report all funeral expenses, family allowance, debts of decedent, etc.

	Disbursements
	\$
If continuation sheet(s) are used, enter total of same here	\$
Total (carry forward to summary)	\$

**SCHEDULE "H"**  
**INCOME \* ADMINISTRATION EXPENSES**

These may include personal representative's compensation allocable to income, expenses of safeguarding the principal, interest collection charges, interest on debts of the decedent, interest on estate obligations, interest payable to general legatees and fiduciary income taxes allocable to ordinary income.

\* Schedule H must be used only in cases where the Will creates a trust.

	Disbursements
	\$
If continuation sheet(s) are used, enter total of same here	\$
Total (carry forward to summary)	\$

SCHEDULE "I"—DISTRIBUTION OF PRINCIPAL

**SCHEDULE "I"**  
**DISTRIBUTION OF PRINCIPAL**

List below all distributions to beneficiaries of the estate, identifying by date and beneficiary all distributions made during the accounting period. All distributions should be itemized.

For example:

To: Suzanne M. Doe			
	(per item FIRST of Will)		
1/5/80	1 garnet and diamond ring	\$ 1,900.00	
	(per item SIXTH of Will)		
5/8/80	Cash	<u>\$ 2,000.00</u>	\$ 3,900.00
To: David A. Doe			
	(Balance of the estate per item NINTH of Will)		
(to be paid upon approval of the account)	25 shs. Fabulous Mutual Fund	\$ 950.00	
	10 shs. Burns Boilers. . ., Inc., common	\$ 1,000.00	
	\$20,000.00 U.S. Treasury Notes, due 2/19/2000	\$19,850.00	
	½ undivided interest in Rose/Egan joint venture	\$ 6,000.00	
	Cash	<u>\$ 1,114.16</u>	\$28,914.16
			Disbursements
			\$
If continuation sheet(s) are used, enter total of same here			\$
Total (carry forward to summary)			\$

SCHEDULE "J"—DISTRIBUTIONS OF INCOME

SCHEDULE "J"  
DISTRIBUTION OF INCOME

List below all distributions of income, identifying by date all distributions made during the accounting period.

For example:

TO: Christopher T. Doe, Trustee under Article FOURTH for Nancy Doe  
2/13/80 Cash

\$427.68

	Disbursements
	\$
If continuation sheet(s) are used, enter total of same here	\$
Total (carry forward to summary)	\$

SCHEDULE "K"—UNDISTRIBUTED ASSETS

**SCHEDULE "K"**  
**UNDISTRIBUTED ASSETS**

(use only in accounts that are not final)

List below all assets held at the end of the accounting period. Each asset must be listed separately and described fully.

Example:

500 shares Thomas Enterprises, Inc. common stock	\$10,000.00
Upstanding Trust Company savings account no. 01-23-5	5,825.63

In trust cases, it is necessary to provide a breakdown as to principal and income.

<u>To determine principal</u>	<u>To determine income</u>
Totals from Schedules A, B and C   \$ ____	Totals Schedules D and E   \$ ____
Adjustments per Schedules C (2)   \$ ____	Disb. Schedules H and J   \$ ____   \$ ____
Disb. per Schedules F, G and I   \$ ____   \$ ____	

	Disbursements
	\$
	\$
	\$

If continuation sheet(s) are used, enter total of same here

Total (carry forward to summary)

Provide in the space below a detailed explanation as to why the estate is held open.

**TAX CERTIFICATION AND FINDING**

(Applicable to final accounts of estates of decedents dying after March 31, 1987)

**Explanatory Note:** Pursuant to Section 17 of the D.C. Inheritance and Estate Tax Revision Act (D.C. Code 47-3716 )1987 Supp)) the Court, prior to approving a final account of a personal representative who is required to file a federal estate tax return, must make a finding that the estate transfer tax provided in the Act has been paid in full or that no tax is due. SCR-PD 114 and SCR-PD 414 require the Personal Representative to include in the final account a certification which will enable the Court to make the required finding.

As required by SCR-PD 114 or SCR-PD 414, as applicable,

- 1.  a federal estate tax return is not required to be filed,
- or
- 2.  a federal estate tax return is required and the District of Columbia estate transfer tax, including applicable interest
  - has been paid in full
  - or
  - no such tax is due

\_\_\_\_\_  
Date

\_\_\_\_\_  
Personal Representative(s)

[Note: If box 2, above is checked, SCR-PD 116 or SCR-PD 414, as applicable, requires the filing of an applicable certificate of the District of Columbia Department of Finance and Revenue in order for the Court to make a finding, pursuant to D.C. Code 47-3716, of satisfaction of taxes.]

**SUPERIOR COURT OF THE DISTRICT OF COLUMBIA  
PROBATE DIVISION**

Estate of \_\_\_\_\_  
Deceased

Administration No. \_\_\_\_\_

D.C. Code 47-3716 finding:

On this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, the Court finds that there is no liability for the estate transfer tax as provided in the District of Columbia Inheritance and Estate Tax Revision Act of 1986, the Personal Representative having  filed a certificate of the District of Columbia Department of Finance and Revenue that the tax has been discharged or is not due (or)  filed a certification that the personal representative is not required to file a federal estate tax return.

\_\_\_\_\_  
JUDGE

### CERTIFICATE

Pursuant to D.C. Code §20-721, I certify that there has been mailed or delivered to all of the following interested persons within the previous 15 days:

a copy of the account

or

a notice that the account was to be filed on or before \_\_\_\_\_

LIST ALL INTERESTED PERSONS (Provide Separate Attachment, If Necessary)

Name	Relationship	Address
------	--------------	---------

I certify that all claims formally filed at the Office of the Register of Wills or otherwise presented to me have been paid or rejected. (delete in intermediate accounts)

If compensation is claimed in this account pursuant to D.C. §20-751 or §20-753 (as applicable), I certify that said compensation has:

been approved by a Court order, dated \_\_\_\_\_

been requested in a petition which is now pending before the Court

been requested in a petition filed with this account

been provided for in the will

I (do) (do not) request termination of my appointment as personal representative pursuant to D.C. Code §20-1301.

I do solemnly declare and affirm under penalty of law that the contents of the foregoing document are true and correct to the best of my knowledge, information, and belief.

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Date

\_\_\_\_\_  
Personal Representative(s)

**IMPORTANT: See Notice on reverse of this page.**

## NOTICE TO INTERESTED PERSONS

(Pursuant to D.C. Code §20-726, 735(b) and Probate Rules 116 and 416 as applicable)

An interested person is entitled to file written exceptions or objections to this account within 30 days of the date the account is filed with the Court [60 days if unsupervised]. Such exceptions or objections may be filed with the Office of the Register of Wills, 500 Indiana Ave., N.W., Washington, D.C. 20001. A copy of the exceptions or objections must be mailed to the personal representative.

**Superior Court of the District of Columbia  
PROBATE DIVISION**

**ORDER APPROVING ACCOUNT  
SUPERVISED ESTATES ONLY\***

Estate of \_\_\_\_\_ Administration No. \_\_\_\_\_

On this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ the foregoing account, being presented for approval, is, after examination by the Court (without formal audit), approved and passed. It is further ordered that the matter of termination of the appointment of the personal representative is held in abeyance pending the approval of a petition filed in accordance with Probate Division Rule 123 or 423 (as applicable).

\_\_\_\_\_  
JUDGE

cc: (list all interested parties)

**\* Note: This order is to be used for supervised estates only.**