

.....
Address of counsel Address of petitioner

.....
.....
Telephone number Telephone number

.....
Bar number

VERIFICATION

I,, being first duly sworn on oath, depose and say that I have read the foregoing pleadings by me subscribed and that the facts therein stated are true to the best of my knowledge, information and belief.

Signature

Subscribed and sworn to before me this day of, 20.....

Notary Public

CERTIFICATE OF SERVICE

I hereby certify that on the day of, 20....., a copy of the foregoing Petition for Authority to Expend Funds was served by first-class mail, postage prepaid, upon following parties to and affected persons in the above-captioned case.

Name Address

.....
.....
.....
.....
.....

Signature

Form 2. [Petition for authority to invest (SCR-PD 222)].

SUPERIOR COURT OF THE DISTRICT OF COLUMBIA
PROBATE DIVISION

In Re:)
)
.....) Guardianship No.
)
A Minor)

PETITION FOR AUTHORITY TO INVEST (SCR-PD 222)

1. (Name of petitioner)
2. Petitioner hereby provides the following information:
[Give age and birth date]
 - a. Age of minor:
 - b. Residence of minor:
 - c. Current assets:
 - d. Income:

3. Petitioner seeks the following relief: [Describe the expenditure or sale for investment for which authority is requested. See SCR-PD 222; D.C. Code § 21-148.]

4. Petitioner is entitled to this relief because [Explain how the relief sought will benefit the minor and/or his/her estate.]

..... Signature Signature
..... Counsel for petitioner Petitioner
..... Address of counsel Address of petitioner
..... Telephone number Telephone number
..... Bar number	

VERIFICATION

I,, being first duly sworn on oath, depose and say that I have read the foregoing pleadings by me subscribed and that the facts therein stated are true to the best of my knowledge, information and belief.

Signature
Subscribed and sworn to before me this day of, 20.....

Notary Public

CERTIFICATE OF SERVICE

I hereby certify that on the day of, 20....., a copy of the foregoing Petition for Authority to Invest was served by first-class mail, postage prepaid, upon following parties to and affected persons in the above-captioned case.

Name	Address
.....
.....
.....
.....

.....
.....
Signature

Form 3. [Petition for approval of investment plan or program (SCR-PD 222)].

SUPERIOR COURT OF THE DISTRICT OF COLUMBIA
PROBATE DIVISION

In Re:)
)
.....) Guardianship No.
)
A Minor)

PETITION FOR APPROVAL OF
INVESTMENT PLAN OR PROGRAM (SCR-PD 222)

1. (Name of petitioner)
2. Petitioner hereby provides the following information:
[Give age and birth date]
 - a. Age of minor:
 - b. Residence of minor:
 - c. Current assets:
 - d. Income:

3. Petitioner seeks the following relief: [Describe the investment plan or program for which approval is sought. See SCR-PD 222 and SCR-PD 5.]

4. Petitioner is entitled to this relief because [Explain how the relief sought will benefit the minor and/or his/her estate.]

..... Signature Signature
..... Counsel for petitioner Petitioner
..... Address of counsel Address of petitioner
..... Telephone number Telephone number
..... Bar number	

VERIFICATION

I,, being first duly sworn on oath, depose and say that I have read the foregoing pleadings by me subscribed and that the facts therein stated are true to the best of my knowledge, information and belief.

Signature
Subscribed and sworn to before me this day of, 20.....

Notary Public

CERTIFICATE OF SERVICE

I hereby certify that on the day of, 20....., a copy of the foregoing Petition for Approval of Investment Plan was served by first-class mail, postage prepaid, upon following parties to and affected persons in the above-captioned case.

Name	Address
.....
.....
.....

.....
.....
.....
Signature

**Appendix -- General Information for Heirs and Legatees
(For estates of decedents dying on or after July 1, 1995).**

D.C. SCR-PD Appx., Form I

Rule 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 a 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.

COMMENT:

INTRODUCTION

Pursuant to the provisions of *D.C. Code § 20-704(b)* (1981 & Supp. 1995)n1, the Personal Representative of a decedent's estate is required to send this statement of general informa-

tion to each heir, legatee, and known creditor. The law requires that this statement contain the following information:

n1 All citations to the D.C. Code herein refer to the 1981 edition and the 1995 Supplement.

(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, and the Court Rules, consult an attorney.

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

Creditor:

A person or organization owed money by the decedent.

Heir:

A relative of a decedent who inherits property if the decedent had no will.

Interested Person:

An heir, legatee, or creditor who timely presents a claim of \$ 500 or more.

Legatee:

A surviving spouse or person who, under the term of a will, would receive property.

Personal Representative:

The person appointed by the D.C. Superior Court to settle the financial affairs of someone who has died.

Supervised Administration:

An estate administration wherein the actions of the personal representative are supervised or monitored by the court.

Unsupervised Administration:

An estate administration wherein the actions of the personal representative generally are not supervised by the court.

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.

Rule 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 of the Court.

Rule III. Rights of heirs and legatees.

(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. 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 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 request 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.

Rule IV. Role of the Register of Wills.

(a) The Register of Wills is the administrative officer of the Court responsible for supervising the administration of the decedent's estate.

(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.

Probate Forms for Estates of Decedents Dying on or after July 1, 1995.

D.C. SCR-PD Form 1

Form 1. Court costs.

(Effective July 1, 1995) Pursuant to SCR-Probate 425(a) and SCR-Probate 425(c).

STANDARD & ABBREVIATED

PROBATE PROCEEDINGS

VALUE OF PROBATE ESTATE COSTS

VALUE OF PROBATE ESTATE COSTS

Under \$ 500 No cost

\$ 500.01 to \$ 2500 \$ 15

\$ 2500.01 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

plus 0.02% of excess

over \$ 5,000,000

over \$ 5,000,000

MISCELLANEOUS CHARGES

ITEM COURT COSTS

ITEM COURT COSTS

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 Employees
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 § 20-1301(c)*) \$ 20
For any petition filed under SCR-PD 412 by one other
than the personal representative or special administrator \$ 20

- 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

Heir/Legatee/Creditor (\$ 500) Address Relationship (Age, if under 18)

(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 Total \$

name

Unpaid Total \$

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.

.....
Signature of Attorney for Petitioner Signature of Petitioner (Tel. No.)

.....
Typed name of Attorney Signature of Petitioner (Tel. No.)

.....
Signature of Petitioner (Tel. No.)

.....
Attorney's Address Signature of Petitioner Unified Bar No.

ACCEPTANCE AND CONSENT OF EACH PERSONAL REPRESENTATIVE

I do hereby accept the duties of the office of personal representative of the estate of deceased, whether in a supervised or unsupervised administration, and consent to personal jurisdiction in any action brought in the District of Columbia against me as personal representative or arising out of the duties of the office of personal representative pursuant to *D.C. Code § 20-501*.

.....
Signature of Petitioner Signature of Petitioner Signature of Petitioner

POWER OF ATTORNEY

To be Executed by Each Non-resident Personal Representative

Pursuant to *D.C. Code § 20-303(b)(7)*, I do hereby irrevocably appoint the Register of Wills and successors in office as the person upon whom all notices and processes issued by a competent court in the District of Columbia may be served with the same effect as personal service in relation to all suits or matters pertaining to the estate in which the letters are to issue.

.....
(Signature) (Address)

.....
(Signature) (Address)

.....
(Signature) (Address)

Form 3. Abbreviated Probate Order.

Estate of Administration No.

..... Age

Deceased

Abbreviated Probate Order

(For 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, 20 ..,

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.

Form 4. Consent to Appointment of Personal Representative.

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

Form 5. Bond of Personal Representative Pursuant to D.C. Code § 20-502(a).

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)

..... (Seal)

..... (Seal)

.....

Dated this day of Surety

....., 20 .. By: (Seal)

D.C. SCR-PD Form 6

Form 6. Bond of Personal Representative Pursuant to D.C. Code § 20-502(a-1).

Estate of Administration No.

.....
Deceased

Bond of Personal Representative
Pursuant to *D.C. Code § 20-502(a-1)*

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
....., 20 .. By: (Seal)

Form 7. Petition for Personal Representative's Bond Pursuant to D.C. Code § 20-502(a-1).

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 bene-
fit 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 Rep-
resentative(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.

Form 8. Waiver of Personal Representative's Bond.

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

Form 9. Notice of Standard Probate.

Notice of Standard Probate

Estate of Administration No.

.....
Deceased

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 by 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:

Name of newspaper:

.....
Signature of Petitioner/Attorney Register of Wills

..... Clerk of the Probate Division

.....

.....

Address & Phone No.

Form 10. Notice of Appointment, Notice to Creditors and Notice to Unknown Heirs.

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:

..... TRUE TEST COPY

REGISTER OF WILLS

D.C. SCR-PD Form 11

Form 11. Verification and Certificate of Notice By Personal Representative Pursuant to SCR-PD 403(b)(4).

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 20 ..., 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).

Dated:
.....

.....
Personal Representative(s)

Attorney:

Form 12. Inventory.

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

Table with 3 columns: Schedule, Type of Property, Appraised Value. Rows A through G listing various assets like real property, tangible personal, corporate stocks, bonds, bank accounts, and debts.

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, 20, 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).

Dated:

Attorney:

Personal Representative(s)

D.C. SCR-PD Form 13

Form 13. Inventory Schedule.

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)

Form 14. Petition for Order Directing Payment of Claim Pursuant to D.C. Code § 20-909(a).

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.

.....
Claimant

Dated:

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, 20 ..., 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

Form 15. Notice of Action Taken on Claim.

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)

Dated 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.

Form 16. Request for Extension of Personal Representative's Appointment.

Estate of Administration No.
.....

Deceased

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

(I) (We),, the personal representative(s) of the estate of de-
ceased, 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) ap-
pointment be extended for an additional twelve months, beginning on the expiration date as
shown in paragraph (b) above.

.....
.....
Personal Representative(s)

Dated:

Form 17. Order Extending Appointment of Personal Representative(s).

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, 20 ...,

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

former date of termination terminated hereafter.

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 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.)

.....
.....

Form 18. Waiver of Filing Inventories and Accounts.

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 402(b)(4) was filed

.....,

Insert Date

or

() The Verification and Certificate Pursuant to Rule 402(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, 19 .., 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).

Dated:
.....

Personal Representative(s)

Attorney:

Form 19. Notice Accompanying Final Account.

Estate of _____ Administration No. _____
.....

Deceased

Notice Accompanying Final Account

Enclosed with this notice is a copy of the final account of the 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.

.....
Personal Representative(s) or Counsel for Personal Representa-
tive(s)

Dated:

Form 20. Waiver of Formal Audit of Account and Consent to Account as Stated.

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 re-
cords 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.

Form 21. Petition for Termination of Appointment of Supervised Personal Representative.

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, 20 ...

List names of heirs/residuary legatees and unpaid creditors

.....
Personal Representative(s)

Form 22. Order Terminating Appointment of Supervised Personal Representative(s).

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 satisfaction 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, 20 ..,

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:
.....

Form 23. Certificate of Completion.

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, 20 .., a copy of the final account and the corresponding notice described above, as well as a copy of this Certificate of Completion on, 20 .. :

List Names and Addresses

Dated:

Personal Representative(s)

Form 24. Notice of Appointment of Foreign Personal Representative and Notice to Creditors.

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 es-
tate of, deceased, on, 20 .., 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., Wash-
ington, 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)

.....

.....

.....
TRUE TEST COPY

.....
REGISTER OF WILLS

Form 25. Appointment of Agent to Accept Service of Process.

Estate of Administration No. Deceased Ap-
pointment 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, 20 ...

..... Personal Representative(s)
..... Address
..... Signature of Agent in the District of Colum-
bia District of Columbia mailing address of
Agent

Form 27. Financial account information (SCR-PD 5.1).

PROBATE DIVISION
FORM 27. Financial Account Information

Estate of _____ Case No. _____
decedent/minor/adult ward/custodian

Name on Account	Name and Address of Bank/Financial Institution	Account Number

This report will be maintained under seal pursuant to SCR-PD 5.1, recorded in a secure Court database, and available only to authorized Court personnel, unless otherwise included in the public record.