

NOTICE OF CHARITABLE GIFT (In

Accordance with Pa. O.C. Rule 4.4)

COURT OF COMMON PLEAS OF BUCKS COUNTY

ORPHANS' COURT DIVISION

ESTATE OF _____, SETTLOR DECEASED

No. _____

Chief, Charitable Trusts and Organizations Section
Office of the Attorney General

Dear Sir or Madam:

Notice is given of a charitable gift as follows:

1. The nature of the present proceeding is an Account: Yes No If no, please proceed to Question 2.

(a) The Account is filed in a court with a separate Orphans' Court Division and has been or will be listed for Audit on _____,

in _____.

(State name of Courthouse and town/city.)

The time and place of the Audit is Court Room _____ at _____ o'clock. If not provided herein, the time and location will be provided upon request when that information becomes available.

(b) The Account is filed in a court without a separate Orphans' Court Division, and the last day for filing written objections is _____, at _____ o'clock.

Any objection shall be filed with _____ on or before the date and time above. *(State name of Courthouse and town/city.)*

(c) The Account concerns an estate or trust in which a charity has an interest or is a potential distributee. Yes No

If NO, the Account concerns an estate or trust in which all or part of the balance of assets remaining on hand will be distributed to:

an estate in which a charity has an interest; or

a trust in which a charity is named as a qualified beneficiary as defined in 20 Pa.C.S. § 7703.

* If more space is required, attach additional sheets.

Estate of _____,

SETTLOR

DECEASED

(d) If residuary gift, state nature and value of share.

4. Provide a brief statement of all pertinent questions to be presented to the Court for adjudication or other disposition, including unresolved claims and any material questions of interpretation or distribution which may affect the value of the charitable interest.

5. The names and addresses of the fiduciaries are (state whether Executors and/or Trustees):

6. The names and addresses of counsel for the fiduciaries:

Estate of _____,

SETTLOR DECEASED

- 7. (a) A copy of the instrument creating the gift is attached hereto.
- (b) If the gift is other than a pecuniary legacy which will be paid in full, there is attached hereto:
 - (1) A copy of the Account, if one has been filed
 - (2) A copy of any other relevant documents

Very truly yours,

Date

Signature

Name of Counsel

Supreme Court I.D. No.

Name of Law Firm

Address

Telephone

Email