

Table of Contents

Volume 25

CHAPTER 1. ADOPTION

I. IN GENERAL

- § 1:1 Jurisdiction and venue
- § 1:2 Contesting adoption
- § 1:3 Termination of parental rights
- § 1:4 Criminal penalties
- § 1:5 Recent developments
- § 1:6 Remote and electronic notarization
- § 1:7 Remote notarization
- § 1:8 Audio visual notarization
- § 1:9 Guardian ad litem guidelines
- § 1:10 Guardian ad litem code of ethics

II. INTERVIEW FORMS

- § 1:11 Adoption interview sheet

III. PREADoption PROCEDURE

- § 1:12 Private placement adoptions waiving agency approval
- § 1:13 Petition for waiver of requirement of prior written approval of placement
- § 1:14 —Order waiving requirement of prior written approval of placement
- § 1:15 Petition to release custody of minor child pending adoption
- § 1:16 —Order on petition to release custody of child pending adoption proceeding
- § 1:17 County Department of Child Services' consent and approval of temporary placement of child
- § 1:18 Temporary custody pending adoption
- § 1:19 Petition requesting temporary custody of child pending adoption
- § 1:20 Order granting temporary custody of child pending adoption

IV. CONSENT AND NOTICE REQUIREMENTS

A. IN GENERAL

1. *Discussion*

- § 1:21 Generally
- § 1:22 Stepparent adoptions
- § 1:23 Blood relative adoptions
- § 1:24 Agency placements
- § 1:25 Private placements

2. *Forms*

- § 1:26 By biological parent—Married to adopting stepparent
- § 1:27 —With knowledge of petitioner's name
- § 1:28 —Without knowledge of petitioner's name
- § 1:29 By alleged putative father who denies paternity
- § 1:30 By minor over the age of 14
- § 1:31 Affidavit of diligent inquiry—Whereabouts of biological parent unknown

B. NOTICE TO PUTATIVE FATHER AND IMPLIED CONSENT

1. *Discussion*

- § 1:32 Generally
- § 1:33 Method of service
- § 1:34 Putative father registry
- § 1:35 Putative father's implied consent
- § 1:36 Burden of proof regarding necessity of parental consents to adoption proceedings

2. *Forms*

- § 1:37 Affidavit of biological mother of child—Putative father unknown
- § 1:38 Affidavit of diligent inquiry—Whereabouts of named putative father unknown
- § 1:39 Praecipe for service by publication
- § 1:40 Published notice to putative father
- § 1:41 Notice—To named father
- § 1:42 —To unnamed father
- § 1:43 —To putative father of birth mother's intention to place unborn child for adoption
- § 1:44 —Affidavit of service of notice to putative father of birth mother's intention to place unborn child for adoption

TABLE OF CONTENTS

- § 1:45 Putative father registration form
- § 1:46 Putative father registry affidavit
- § 1:47 Request for search of putative father registry

C. OTHER PERSONS ENTITLED TO NOTICE OF ADOPTION PROCEEDINGS

- § 1:48 General discussion
- § 1:49 Notice of adoption

V. PETITIONS FOR ADOPTION OF CHILDREN

A. IN GENERAL

- § 1:50 General requirements
- § 1:51 Contents of petition
- § 1:52 —Filing
- § 1:53 Supervisory period
- § 1:54 Medical history report
- § 1:55 —Form
- § 1:56 —Adoption history for adoptive parents
- § 1:57 Criminal history check

B. TYPES OF MINOR ADOPTIONS

1. *In General*

- § 1:58 Generally

2. *Stepparent Adoptions*

- § 1:59 Generally
- § 1:60 Petition

3. *Blood Relative Adoption*

- § 1:61 Generally
- § 1:62 Petition

4. *Agency Placement Adoption*

- § 1:63 Generally
- § 1:64 Petition

5. *Private Placement Adoption*

- § 1:65 Generally
- § 1:66 Petition

6. *Adoption of Abandoned Child*

- § 1:67 Generally

- § 1:68 Petition
- § 1:69 Foreign adoption proceedings
- § 1:70 Petition for foreign adoption

VI. DECREES OF ADOPTION

- § 1:71 Final hearing and decree of adoption
- § 1:72 Limitations on direct or collateral attacks or appeals of adoption decrees
- § 1:73 Decree of adoption—All consents secured
- § 1:74 —No consents secured—Abandoned child
- § 1:75 — —Stepparent adoption—Service by publication
- § 1:76 — — —Personal service
- § 1:77 Decree of foreign adoption

VII. RECORD OF ADOPTION

- § 1:78 Generally
- § 1:79 Record of adoption form
- § 1:80 Storing and maintenance of adoption records

VIII. ADULT ADOPTIONS

- § 1:81 Generally
- § 1:82 Petition
- § 1:83 Consent to adoption of adult
- § 1:84 Order on petition for adoption of adult

IX. FOREIGN ADOPTIONS

- § 1:85 Interstate compact on adoption assistance
- § 1:86 Filing decree of foreign adoption
- § 1:87 Petition to file decree of foreign adoption
- § 1:88 Order on petition to file decree of foreign adoption

X. ADOPTION HISTORY REGISTRY

- § 1:89 Generally
- § 1:90 Postadoption visitation privileges
- § 1:91 Submission and request for information
- § 1:92 Release of information
- § 1:93 Appointment of confidential intermediary
- § 1:94 Birth parent nonrelease form
- § 1:95 Application for adoption history identifying information
- § 1:96 Application for adoption history nonidentifying information

TABLE OF CONTENTS

§ 1:97 Birth parent contact preference

CHAPTER 2. GUARDIANSHIP

I. INTRODUCTION

- § 2:1 Generally; definitions
- § 2:2 Jurisdiction
- § 2:3 Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act
- § 2:4 Venue
- § 2:5 Recent developments
- § 2:6 Guardianship Oversight Task Force Report
- § 2:7 Remote and electronic notarization

II. SITUATIONS NOT REQUIRING FORMAL GUARDIANSHIP

A. IN GENERAL

- § 2:8 Parents exercising inherent rights
- § 2:9 Applications by mental health officials
- § 2:10 Transfer of minor child's property
- § 2:11 Form of affidavit for transfer of minor child's assets to an individual without a guardianship
- § 2:12 Transfer of incapacitated person's property
- § 2:13 —Petition to dispense with guardianship
- § 2:14 —Order dispensing with guardianship
- § 2:15 Petition to utilize funds for incapacitated person
- § 2:16 Order directing utilization of funds for incapacitated person
- § 2:17 Volunteer advocate
- § 2:18 —Thirty-day report
- § 2:19 —Sixty-day report
- § 2:20 —Ninety-day report
- § 2:21 —Annual report
- § 2:22 —Final report
- § 2:23 Power of attorney
- § 2:24 Supported decision making
- § 2:25 Supported decision making agreement—Single supporter
- § 2:26 —More than one supporter
- § 2:27 Consent of guardian
- § 2:28 Revocation of supported decision making agreement

B. UNIFORM TRANSFERS TO MINORS ACT

- § 2:29 Generally

- § 2:30 Designation of successor custodian by current custodian
- § 2:31 Designation of successor custodian by minor over the age of 13
- § 2:32 Petition for appointment of successor custodian—Of bank account
- § 2:33 —Of stock
- § 2:34 Resignation of custodian
- § 2:35 Consent to serve as successor custodian
- § 2:36 Order appointing successor custodian

III. APPOINTMENT OF GUARDIAN

A. INTERVIEW FORMS

- § 2:37 Generally
- § 2:38 Guardianship of the person
- § 2:39 Guardianship of the estate

B. PETITION

- § 2:40 Generally
- § 2:41 Guardianship registry information sheet
- § 2:42 Guardian of person of minor
- § 2:43 Guardian of estate of minor
- § 2:44 Guardian of person and estate of minor
- § 2:45 Guardian of person and estate of adult
- § 2:46 Guardian of estate of adult
- § 2:47 Guardian of person of adult—Adult owns no property
- § 2:48 Limited guardian of estate of adult—To handle investments

C. NOTICE REQUIREMENTS

- § 2:49 Generally
- § 2:50 Order setting hearing and directing notice—Adult guardianship case
- § 2:51 Notice—To alleged incapacitated person
- § 2:52 —To interested persons
- § 2:53 —To nursing home or hospital
- § 2:54 Waiver of notice—By incapacitated adult
- § 2:55 —By minor 14 years of age
- § 2:56 —By relative

D. HEARING

- § 2:57 Generally

TABLE OF CONTENTS

§ 2:58	Appearance
§ 2:59	Appointment of attorney or guardian ad litem
§ 2:60	Guardian ad litem guidelines
§ 2:61	Guardian ad litem code of ethics
§ 2:62	Appointment of attorney or guardian ad litem— Petition for appointment of guardian ad litem
§ 2:63	—Order appointing guardian ad litem
§ 2:64	Report of guardian ad litem, petition for discharge and petition for fees
§ 2:65	Order approving report of guardian ad litem, petition for discharge and petition for fees
§ 2:66	Objections to petition to appoint guardian
§ 2:67	Physician’s report
§ 2:68	Petition for issuance of confidential health disclosure order
§ 2:69	Order setting hearing on petition for issuance of confidential health disclosure order
§ 2:70	Notice of hearing
§ 2:71	Waiver of notice
§ 2:72	Objection to petition for issuance of confidential health disclosure order
§ 2:73	Confidential Health Disclosure Order

E. FINDINGS AND ORDER

§ 2:74	Generally
§ 2:75	Guardian of person of minor
§ 2:76	Guardian of estate of minor
§ 2:77	Guardian of person and estate of minor
§ 2:78	Guardian of person and estate of adult
§ 2:79	Guardian of estate of adult
§ 2:80	Guardian of person of adult
§ 2:81	Limited guardian of estate of adult—To handle investments

F. QUALIFICATION OF GUARDIAN

1. *Discussion*

§ 2:82	Who may qualify?
§ 2:83	—Priority
§ 2:84	Bonding requirements
§ 2:85	Guardian’s petition restricting brokerage account principal
§ 2:86	Notice of exclusion
§ 2:87	Order restricting brokerage account principal
§ 2:88	Attorney’s undertaking and obligation

- § 2:89 Certification of restriction of account in compliance with attorney's undertaking and obligation
- § 2:90 Petition for release from attorney's undertaking and obligation
- § 2:91 Order granting petition for release from attorney's undertaking and obligation
- § 2:92 Letters of guardianship
- § 2:93 Letters of guardianship of the person
- § 2:94 Letters of guardianship of the estate
- § 2:95 Letters of guardianship of the person and estate
- § 2:96 Letters of limited guardianship
- § 2:97 Certification of letters

2. Forms of Acceptance and Oath

- § 2:98 Guardian of person of minor
- § 2:99 Guardian of estate of minor
- § 2:100 Guardian of person and estate of minor
- § 2:101 Guardian of person and estate of adult
- § 2:102 Guardian of estate of adult
- § 2:103 Guardian of person of adult
- § 2:104 Limited guardian of estate of adult

IV. ADMINISTRATION OF GUARDIANSHIP

A. OVERVIEW OF GUARDIAN'S POWERS AND DUTIES

- § 2:105 General duties and responsibilities
- § 2:106 General powers
- § 2:107 Powers and duties relating to property
- § 2:108 Powers relating to dissolution
- § 2:109 Petition for authority to petition for dissolution of marriage
- § 2:110 Order setting hearing on petition for authority to petition for dissolution of marriage
- § 2:111 Notice of hearing on petition for authority to petition for dissolution of marriage
- § 2:112 Order granting petition for authority to petition for dissolution of marriage
- § 2:113 Estate planning by guardians
- § 2:114 Self-dealing and conflicts of interest
- § 2:115 Delegation of powers
- § 2:116 —Form of power of attorney
- § 2:117 Standby guardian
- § 2:118 Declaration designating standby guardian
- § 2:119 Instructions to guardians

TABLE OF CONTENTS

§ 2:120	—Form: Instructions to guardian of the person over minor
§ 2:121	—Form: Instructions to guardian of the person over adult
§ 2:122	—Form: Instructions to guardian of an estate
§ 2:123	General comments regarding transferring of assets to reflect guardianship
§ 2:124	Attorney’s letter to brokerage firm
§ 2:125	Attorney’s letter to mutual fund company
§ 2:126	Attorney’s letter to annuity company
§ 2:127	Attorney’s letter to banking institution
§ 2:128	Attorney’s letter to tenant
§ 2:129	Attorney’s letter to contract purchaser
§ 2:130	Attorney’s letter to utility company
§ 2:131	Attorney’s letter to health care provider
§ 2:132	Guardian’s letter to brokerage firm
§ 2:133	Guardian’s letter to mutual fund company
§ 2:134	Guardian’s letter to annuity company
§ 2:135	Guardian’s letter to banking institution
§ 2:136	Guardian’s letter to tenant
§ 2:137	Guardian’s letter to contract purchaser
§ 2:138	Guardian’s letter to utility company
§ 2:139	Guardian’s letter to health care provider

B. NOTICE OF PROCEEDINGS INVOLVING GUARDIANS

§ 2:140	Generally
§ 2:141	Request by interested party for notice of further proceedings
§ 2:142	General form of order setting guardian’s petition for hearing

C. INVENTORY

§ 2:143	Generally
§ 2:144	Form of inventory
§ 2:145	Report on restricted accounts
§ 2:146	Notice of exclusion
§ 2:147	Jointly held assets of incapacitated person
§ 2:148	Petition for permission for guardian to liquidate jointly held assets for upkeep and maintenance of incapacitated person
§ 2:149	Notice of exclusion
§ 2:150	Order authorizing liquidation of jointly held accounts for maintenance and welfare of incapacitated person

D. PETITIONS BY GUARDIAN

1. *Completion of Protected Person's Contracts*

§ 2:151 Generally

§ 2:152 Petition

§ 2:153 Order

2. *Authorization to Dispose of Surplus Property for Estate Planning or Medicaid Purposes*

a. Estate Planning for Protected Person

§ 2:154 Generally

§ 2:155 Petition for permission to execute estate plan

§ 2:156 Order authorizing dispositions to implement estate plan

§ 2:157 Petition for court approval of execution of disclaimer on behalf of incapacitated person

§ 2:158 Order approving guardian's disclaimer

§ 2:159 Disclaimer of interest in decedent's estate by guardian

§ 2:160 Petition for authority to distribute incapacitated person's household furnishings and personalty in accordance with incapacitated person's will

§ 2:161 Order authorizing guardian to distribute household furnishings and personalty in accordance with incapacitated person's will

b. Transfer of Medicaid Recipient's Property to Spouse

§ 2:162 Generally

§ 2:163 Petition to transfer assets to spouse

§ 2:164 Order setting hearing on petition to transfer assets to spouse

§ 2:165 Order authorizing transfer of assets to spouse

c. Prepayment of Funeral and Burial Expenses

§ 2:166 Generally

§ 2:167 Petition for authority to prepay funeral expenses

§ 2:168 Order authorizing prepayment of funeral expenses

3. *Modification of Bond*

§ 2:169 Generally

§ 2:170 Petition to reduce bond

§ 2:171 Order reducing bond

TABLE OF CONTENTS

4. Settlement of Litigation Brought on Behalf of Protected Person

a. In General

- § 2:172 Generally
- § 2:173 Petition—By guardian—To approve settlement of minor’s personal injury claim
- § 2:174 Order approving settlement of minor’s personal injury claim—By guardian
- § 2:175 Release by guardian

b. By Parent As Natural Guardian

- § 2:176 Generally
- § 2:177 Petition—By parent or person having care and custody of minor—To approve settlement of personal injury claim—Not exceeding \$25,000
- § 2:178 Order setting hearing date
- § 2:179 Order approving settlement of personal injury claim—By parent or person having care and custody of minor
- § 2:180 Release by parent
- § 2:181 Petition—By parent or person having care and custody of minor—To approve settlement of personal injury claim and for protective order—Not exceeding \$25,000
- § 2:182 Order approving settlement of personal injury claim and for protective order—By parent or person having care and custody of minor

5. Sale of Protected Person’s Property

- § 2:183 Generally
- § 2:184 Petition to sell minor’s real estate
- § 2:185 Petition to sell incapacitated adult’s real estate—Former residence
- § 2:186 Order authorizing sale of real estate
- § 2:187 Guardian’s report of sale of real estate
- § 2:188 Order approving report of sale of real estate
- § 2:189 Guardian’s deed
- § 2:190 Petition to expend funds of guardianship for necessary repairs in order to proceed with sale of incapacitated adult’s real estate—Former residence
- § 2:191 Petition to sell real estate for less than appraised value
- § 2:192 Order authorizing sale of real estate for less than appraised value
- § 2:193 Petition to sell personal property

- § 2:194 Order authorizing sale of personal property
- § 2:195 Petition for ratification of sale of personal property
- § 2:196 Order granting petition for ratification of sale of
personal property
- § 2:197 Petition to distribute personal property
- § 2:198 Order authorizing distribution of personal property
- § 2:199 Petition to liquidate assets
- § 2:200 Order authorizing liquidation of accounts

6. Authorization to Change Protected Person's Residence

- § 2:201 Generally
- § 2:202 Petition to allow change of residence—To another
county in Indiana
- § 2:203 —To another state
- § 2:204 Order authorizing change of residence—To another
county in Indiana
- § 2:205 —To another state
- § 2:206 Termination of guardianship when proceedings are
transferred to another state
- § 2:207 Guardian's petition to terminate Indiana
guardianship when guardianship has been
transferred and refiled in another jurisdiction due to
relocation of incapacitated person
- § 2:208 Order terminating Indiana guardianship over person
and estate transferred to another jurisdiction

7. Maintenance and Support of Protected Person

a. In General

- § 2:209 Discussion
- § 2:210 Petition to spend funds for maintenance of protected
person
- § 2:211 Order authorizing expenditure of funds for
maintenance of protected person
- § 2:212 Petition to spend funds for minor's education and
maintenance
- § 2:213 Order authorizing expenditure of funds for minor's
education and maintenance
- § 2:214 Petition to expend funds of guardianship for clothing
and furniture for nursing home room of
incapacitated person
- § 2:215 Order authorizing expenditure of funds from
guardianship for needed clothing and furniture for
nursing home room
- § 2:216 Petition to spend funds for automobile for minor

TABLE OF CONTENTS

§ 2:217	Order authorizing expenditure of funds for purchase of automobile for minor
§ 2:218	Tender of proof of insurance
§ 2:219	Petition to utilize funds for home improvements to benefit incapacitated person
§ 2:220	Order authorizing expenditure of funds for home improvements for benefit of incapacitated person
§ 2:221	Utilization of funds to maintain incapacitated person in own residence or residence of guardian
§ 2:222	Guardian's petition for use of guardianship funds to remodel residence
§ 2:223	Consent to petition for use of guardianship funds for remodeling residence
§ 2:224	Order approving guardian's petition for use of guardianship funds to remodel residence
§ 2:225	Reimbursement of funds expended on incapacitated person's behalf prior to establishment of guardianship
§ 2:226	Petition to reimburse guardian for expenses incurred prior to guardianship
§ 2:227	Order to reimburse individual for expenses incurred prior to guardianship
b. Use of Incapacitated Adult's Social Security or Retirement Benefits	
§ 2:228	Generally
§ 2:229	Petition to pay benefits directly to incapacitated adult
§ 2:230	Order allowing payment of benefits directly to incapacitated adult
§ 2:231	Petition to allow guardian to use incapacitated adult's Social Security benefits for adult's maintenance and support without maintaining individual receipts
§ 2:232	Order authorizing guardian to use incapacitated adult's Social Security benefits for adult's maintenance and support without retaining individual receipts
§ 2:233	Petition to allow guardian to use incapacitated adult's Social Security benefits for adult's maintenance and support without requiring any biennial accounting to court
§ 2:234	Order authorizing guardian to use incapacitated adult's Social Security benefits for adult's maintenance and support and waiving biennial accountings by guardian
§ 2:235	Monthly payment to guardian or individual for maintenance and care of incapacitated person
§ 2:236	Guardian's petition for payment of adult's maintenance and care

- § 2:237 Consent to petition for payment of adult's maintenance and care
- § 2:238 Order approving guardian's petition for payment of adult's maintenance and care

c. Use of Funds in Protected Person's
Restricted Accounts

- § 2:239 Generally
- § 2:240 Petition for permission to use restricted certificate of deposit
- § 2:241 Notice of exclusion
- § 2:242 Order authorizing redemption of restricted certificate of deposit
- § 2:243 Guardian's petition to release funds from restricted brokerage account to pay income taxes on beneficiary's inheritance and tax preparation fees
- § 2:244 Order to release funds from restricted brokerage account to pay income taxes on beneficiary's inheritance and tax preparation fees

d. Spousal Support Issues in Adult
Guardianships with Premarital
Agreements

- § 2:245 Generally
- § 2:246 Petition to interpret premarital agreement and determine payment of long-term care
- § 2:247 Notice of hearing on guardian's petition to interpret premarital agreement
- § 2:248 Interrogatories for spouse concerning finances
- § 2:249 Order interpreting premarital agreement and obligation of payment for long-term care
- § 2:250 Petition to approve family settlement agreement on interpretation of premarital agreement and the payment of long-term care expenses
- § 2:251 Family settlement agreement on interpretation of premarital agreement and payment of long-term care expenses
- § 2:252 Order approving family settlement agreement on interpretation of premarital agreement and payment of long-term care

8. *Compensation of Guardian and Attorney*

- § 2:253 Generally
- § 2:254 Petition for attorney's and guardian's fees
- § 2:255 Order approving application for attorney's and guardian's fees

TABLE OF CONTENTS

- § 2:256 Petition for monthly allowance to guardian—For personal services rendered
- § 2:257 Order authorizing monthly allowance to guardian—For personal services rendered
- § 2:258 Petition for hourly compensation of guardian of the person for personal services rendered to incapacitated person
- § 2:259 Order authorizing compensation to guardian of person at an hourly rate
- § 2:260 Petition to expend funds for home care for incapacitated person
- § 2:261 Order to expend funds for home care for incapacitated person
- § 2:262 Petition for interim fees
- § 2:263 Order granting interim fees

E. ACCOUNTING

- § 2:264 Generally
- § 2:265 Form of accounting—With request for fees
- § 2:266 Guardianship biennial accounting format
- § 2:267 Notice of Exclusion
- § 2:268 Order setting accounting for hearing
- § 2:269 Notice of hearing on accounting
- § 2:270 Waiver of notice of hearing on accounting
- § 2:271 Consent to accounting and request for fees
- § 2:272 Order approving current accounting
- § 2:273 Biennial report of guardian of person
- § 2:274 Biennial report on minor's personal condition
- § 2:275 Biennial report on incapacitated adult's personal condition

F. REAL ESTATE ISSUES IN GUARDIANSHIPS

- § 2:276 Generally
- § 2:277 Petition to lease incapacitated person's residence
- § 2:278 Consent by heir at law to lease incapacitated person's real estate to one of the children
- § 2:279 Order authorizing guardian to lease incapacitated person's residence
- § 2:280 Guardian's lease form
- § 2:281 Petition to have delinquent tenant vacate incapacitated person's real estate and secure judgment for delinquent rent
- § 2:282 Order setting hearing on guardian's petition to have delinquent tenant vacate premises

- § 2:283 Clerk's certificate of mailing notice of hearing to delinquent tenant
- § 2:284 Order approving guardian's petition to have delinquent tenant vacate premises
- § 2:285 Occupancy agreement

V. REMOVAL OR RESIGNATION OF GUARDIAN

- § 2:286 Generally
- § 2:287 Petition to remove guardian
- § 2:288 Guardian's resignation
- § 2:289 Petition to appoint successor after resignation
- § 2:290 Order removing guardian
- § 2:291 Order accepting resignation and appointing substitute guardian

VI. TERMINATION OR EXTENSION OF GUARDIANSHIP

A. IN GENERAL

- § 2:292 Generally; grounds for termination
- § 2:293 Effect of termination

B. PETITIONS AND ORDERS ON FINAL ACCOUNTING AND TERMINATION OF GUARDIANSHIP

- § 2:294 Generally
- § 2:295 Final accounting and petition to terminate guardianship
- § 2:296 Sample final accounting
- § 2:297 Order setting final accounting for hearing
- § 2:298 Notice of hearing on final account
- § 2:299 Waiver of notice—By emancipated minor
- § 2:300 —By personal representative of deceased protected person's estate
- § 2:301 —By other interested person
- § 2:302 Objections to guardian's final accounting
- § 2:303 Order approving final account and terminating guardianship—Distribution to estate of deceased incapacitated adult
- § 2:304 —Distribution to emancipated minor
- § 2:305 Supplemental report
- § 2:306 Order approving supplemental report
- § 2:307 Releasing of restricted account to emancipated minor and terminating guardianship

TABLE OF CONTENTS

- § 2:308 Guardian's petition to redeem restricted account, pay attorney's fees and transfer balance to emancipated individual and close guardianship
- § 2:309 Order authorizing redemption of restricted account, payment of attorney fees and transfer of balance to emancipated individual and close guardianship
- § 2:310 Verified petition to extend guardianship
- § 2:311 Order granting verified petition to extend guardianship

C. ADJUDICATION OF COMPETENCY

- § 2:312 Generally
- § 2:313 Guardian's petition for adjudication of competency
- § 2:314 Order setting petition for hearing
- § 2:315 Notice of hearing on restoration of legal rights
- § 2:316 Order restoring rights

D. TERMINATION OF SMALL GUARDIANSHIP ESTATE

- § 2:317 Petition
- § 2:318 Sample final accounting
- § 2:319 Order terminating guardianship

E. PAYMENT OF DECEASED PERSON'S FINAL EXPENSES WITHOUT OPENING PROBATE ESTATE

- § 2:320 Generally
- § 2:321 Petition to allow payment
- § 2:322 Order authorizing payment

VII. TEMPORARY GUARDIANSHIPS

A. APPOINTMENT AND DUTIES OF TEMPORARY GUARDIAN

1. *Discussion*

- § 2:323 Generally
- § 2:324 Appointment after previous guardian suspended
- § 2:325 Notice
- § 2:326 Powers granted; duration
- § 2:327 Qualification
- § 2:328 Temporary guardianship to relocate incapacitated person with family relation

2. *Forms*

- § 2:329 Petition to appoint temporary guardian—For adult

- § 2:330 —To consent to emergency surgery or treatment
- § 2:331 Attorney's affidavit regarding notice
- § 2:332 Order appointing temporary guardian
- § 2:333 Petition to appoint temporary guardian over person
in order to relocate adult to another state and
petition for formal guardianship in that state
- § 2:334 Order appointing temporary guardian for purpose of
relocating incapacitated person to another state
where formal guardianship proceedings will be
commenced
- § 2:335 Acceptance and oath of temporary guardian

B. INVENTORY AND ACCOUNTING

- § 2:336 Generally
- § 2:337 Account and request for fees
- § 2:338 Order setting accounting for hearing
- § 2:339 Notice of hearing on accounting
- § 2:340 Waiver of notice of hearing on accounting
- § 2:341 Consent to accounting and request for fees
- § 2:342 Order approving accounting
- § 2:343 Temporary guardian's sample accounting

VIII. PROTECTIVE PROCEEDINGS

A. OBTAINING PROTECTIVE ORDER

- § 2:344 Generally
- § 2:345 Petition for protective order
- § 2:346 Order setting hearing on protective order
- § 2:347 Notice—To alleged incapacitated person
- § 2:348 —To other interested person
- § 2:349 Waiver of notice—By incapacitated adult
- § 2:350 —By relative
- § 2:351 Protective order
- § 2:352 Acceptance and oath of person appointed by
protective order

B. TERMINATION OF PROTECTIVE ORDER

- § 2:353 Generally
- § 2:354 Report and petition to terminate protective order
- § 2:355 Order terminating protective order

IX. FOREIGN GUARDIANSHIPS

A. PLACING EVIDENCE OF APPOINTMENT ON FILE

- § 2:356 Generally

TABLE OF CONTENTS

§ 2:357 Petition

§ 2:358 Order

B. PAYMENT TO FOREIGN GUARDIAN

§ 2:359 Generally

§ 2:360 Form of affidavit

X. VETERANS' GUARDIANSHIPS

A. APPOINTMENT OF GUARDIAN

§ 2:361 Generally

§ 2:362 Petition for appointment of guardian

§ 2:363 —Form of petition—Incapacitated adult beneficiary

§ 2:364 — —Minor beneficiary

§ 2:365 Notice

§ 2:366 Bond requirements

§ 2:367 Order appointing guardian

B. ADMINISTRATION OF GUARDIANSHIP

§ 2:368 Investments

§ 2:369 Support of beneficiary and others

§ 2:370 —Form of petition to spend funds for maintenance of
minor

§ 2:371 Order authorizing expenditure of funds for
maintenance of minor beneficiary

§ 2:372 Support of beneficiary and others—Form of petition
to spend funds for maintenance of others

§ 2:373 Order authorizing expenditure of funds for
maintenance of others

§ 2:374 Purchase of home for protected person

§ 2:375 Accountings

§ 2:376 Compensation of guardian

§ 2:377 —Form of petition for additional compensation

§ 2:378 Order authorizing additional compensation to
guardian

C. DISCHARGE OF GUARDIAN

§ 2:379 Generally

§ 2:380 Petition to discharge guardian of adult beneficiary

§ 2:381 Sample final accounting

§ 2:382 Petition to discharge guardian of minor

§ 2:383 Order approving final account and terminating
guardianship of adult beneficiary

- § 2:384 Order approving final account and terminating guardianship of minor beneficiary

CHAPTER 3. TRUST ADMINISTRATION

I. IN GENERAL

- § 3:1 Statutory definitions
- § 3:2 Recent developments
- § 3:3 Jurisdiction
- § 3:4 Venue
- § 3:5 Powers of trustees
- § 3:6 —Receipts and expenditures
- § 3:7 Duties of trustees
- § 3:8 —Self-dealing and transactions between trusts
- § 3:9 Trustee's liability
- § 3:10 —Third-party liability
- § 3:11 —Cotrustee liability
- § 3:12 —Successor trustee liability
- § 3:13 —Relief of trustee from liability
- § 3:14 Remedies—Trustees
- § 3:15 —Beneficiaries
- § 3:16 Petition to compel trustee to deliver trust instrument
- § 3:17 Order compelling trustee to deliver trust
- § 3:18 Petition for information by beneficiary with restricted rights for information
- § 3:19 Order directing disclosure of information
- § 3:20 Appeals
- § 3:21 Remote and electronic notarization

II. FILING OF TRUST IN COURT (DOCKETING)

- § 3:22 No statutory requirement
- § 3:23 —Voluntary filing
- § 3:24 —Procedure
- § 3:25 Petition to file trust with court
- § 3:26 Order authorizing filing of trust with court
- § 3:27 Trustee's oath

III. APPOINTMENT AND QUALIFICATION OF TRUSTEE

- § 3:28 Bond
- § 3:29 Resignation or substitution
- § 3:30 Consent for testamentary trustee to qualify without posting bond

TABLE OF CONTENTS

- § 3:31 Petition seeking appointment of substitute or successor trustee
- § 3:32 Objections to appointment of successor trustee
- § 3:33 Order appointing substitute or successor trustee
- § 3:34 Trustee's renunciation
- § 3:35 Trustee's notice of resignation
- § 3:36 Beneficiary's waiver of notice
- § 3:37 Resignation of corporate trustee
- § 3:38 Beneficiary's petition for court to remove corporate trustee and appoint successor trustee due to change in corporation's control
- § 3:39 Order setting hearing on beneficiary's petition for court to remove corporate trustee and appoint successor trustee
- § 3:40 Order removing corporate trustee and appointing successor trustee
- § 3:41 Beneficiary's petition for court to remove individual trustee, require trustee to file an accounting and appoint successor trustee
- § 3:42 Order setting hearing on beneficiary's petition for court to remove acting trustee, require trustee to file an accounting and appoint a successor trustee
- § 3:43 Order removing individual trustee, requiring trustee to file an accounting and appointing a successor trustee
- § 3:44 Instructions for individual trustees
- § 3:45 —Checklist: Duties and responsibilities of trustee
- § 3:46 —Form: Instructions to individual trustee
- § 3:47 —Form: Instructions to bypass trustee

IV. TRUSTEES' PETITIONS AND RELATED FORMS

A. IN GENERAL

- § 3:48 Petitions and notice
- § 3:49 —Service of notice
- § 3:50 Nonjudicial settlements
- § 3:51 General form setting petition for hearing

B. APPOINTMENT OF GUARDIAN AD LITEM

- § 3:52 Generally
- § 3:53 Trustee's petition for appointment of guardian ad litem
- § 3:54 Order appointing guardian ad litem
- § 3:55 Guardian ad litem's answer to trustee's petition to sell real or personal property
- § 3:56 Report of guardian ad litem, petition for discharge and petition for fees

- § 3:57 Order approving report of guardian ad litem, petition for discharge and petition for fees

C. COTRUSTEES' PETITIONS

- § 3:58 Generally
- § 3:59 Cotrustee's petition to obtain permission of court to take action with regard to trust assets
- § 3:60 Order fixing time for hearing on cotrustee's petition to take action with regard to trust assets
- § 3:61 Order granting cotrustee permission to take action with regard to trust assets
- § 3:62 Limiting cotrustees' use of trust funds
- § 3:63 Petition to restrict distribution of trust funds until income tax liabilities are determined
- § 3:64 Order to restrict distribution of trust funds until income tax liabilities are determined
- § 3:65 Petition to remove restriction on trust bank accounts and release funds to trustees for distribution
- § 3:66 Order to remove restriction on trust bank accounts and release funds to trustees for distribution

D. INTERPRETATION OF TRUST PROVISIONS

- § 3:67 Generally
- § 3:68 Petition requesting interpretation of trust provision
- § 3:69 Order fixing time for hearing on trustee's petition for interpretation of trust provision
- § 3:70 Order interpreting trust provision
- § 3:71 Trustee's petition for instructions
- § 3:72 Order fixing time for hearing on trustee's petition for instructions
- § 3:73 Response to trustee's petition for instructions
- § 3:74 Contingent remainderman beneficiary's waiver of hearing and consent to interpretation of last will and testament and distribution of balance held in trust corpus
- § 3:75 Indemnification and hold harmless agreement
- § 3:76 Order regarding trustee's petition for instructions
- § 3:77 Nonjudicial settlement agreement regarding interpretation of trust

E. TRUSTEES' SALE OF PERSONAL AND REAL PROPERTY, DEEDS, LAND CONTRACTS AND REPORTS

- § 3:78 Generally

TABLE OF CONTENTS

§ 3:79	Trustee's petition to sell personal property
§ 3:80	Trustee's petition to sell real estate
§ 3:81	Beneficiary's waiver and consent to sale of property
§ 3:82	Order fixing time for hearing on trustee's petition to sell property
§ 3:83	Notice of hearing on trustee's petition to sell property
§ 3:84	Order approving trustee's petition to sell property
§ 3:85	Offer to purchase real estate from trust
§ 3:86	Trustee's deed
§ 3:87	Trustee's land contract for sale of real estate
§ 3:88	Affidavit of change of trustee

F. DEVIATION FROM TERMS OF TRUST

§ 3:89	Generally
§ 3:90	Trustee's petition to deviate from terms of trust
§ 3:91	Order setting trustee's petition to deviate from terms of trust for hearing
§ 3:92	Beneficiary's consent to deviation and waiver of hearing
§ 3:93	Order approving trustee's petition to deviate from terms of the trust

G. REFORMATION, RESCISSION OR MODIFICATION OF TRUSTS

§ 3:94	Generally
§ 3:95	Trustee's petition to reform trust
§ 3:96	Order setting trustee's petition to reform trust for hearing
§ 3:97	Beneficiary's consent to modification and waiver of hearing
§ 3:98	Order approving trustee's petition for reformation of trust
§ 3:99	Conversion of income trust to total return trust
§ 3:100	Notice of proposed conversion to total return unitrust without court order
§ 3:101	Objection to proposed conversion to total return unitrust
§ 3:102	Petition to convert to total return unitrust
§ 3:103	Order fixing time for hearing on trustee's petition to convert to total return unitrust
§ 3:104	Order authorizing trustee to convert to total return unitrust
§ 3:105	Petition for authorization of otherwise prohibited transaction

- § 3:106 Consent to otherwise prohibited transaction
- § 3:107 Order authorizing otherwise prohibited transaction

H. UTILIZATION OF DISCLAIMERS IN TRUSTS

- § 3:108 Generally
- § 3:109 Petition by trustee seeking court's approval of disclaimer of interest in retirement account
- § 3:110 Order approving petition by trustee seeking court's approval of disclaimer of interest in retirement account
- § 3:111 Trustee's disclaimer of interest in trust assets
- § 3:112 Life income beneficiary's petition regarding the filing of a disclaimer and termination of interest under trust agreement
- § 3:113 Disclaimer by life estate beneficiary of future income interest in trust
- § 3:114 Trustee's waiver of notice and hearing regarding life time beneficiary's petition to file disclaimer of future interest in trust's net income
- § 3:115 Remainder beneficiary's waiver and consent to life income beneficiary's petition to disclaim any future interest in trust's net income
- § 3:116 Order acknowledging valid disclaimer filed by life income beneficiary of trust and merger of income interest in trust with remaindermen interest in trust

I. DECANTING

- § 3:117 Generally
- § 3:118 Notice of decanting
- § 3:119 Petition for instructions
- § 3:120 Order fixing time for hearing on trustee's petition for instructions
- § 3:121 Order on trustee's petition for instructions
- § 3:122 Petition for appointment of special fiduciary
- § 3:123 Order on trustee's petition for appointment of special fiduciary
- § 3:124 Report of special fiduciary
- § 3:125 Order approving report of special fiduciary
- § 3:126 Record of exercise of decanting power

V. ALLOCATION OF RECEIPTS AND DISBURSEMENTS

- § 3:127 Administrating trust principal and income under

TABLE OF CONTENTS

	Uniform Principal and Income Act and determining income distributions
§ 3:128	Notice of proposed action by trustee
§ 3:129	Petition requesting authority to proceed with proposed adjustment of principal and income
§ 3:130	Order fixing time for hearing on trustee's petition for proceeding with adjustments to principal and income
§ 3:131	Order authorizing trustee to proceed with adjustments to principal and income
§ 3:132	Allocation of trust income and receipts
§ 3:133	Allocation of disbursements during administration
§ 3:134	Life income beneficiary's petition for court to review and rule upon payment of disbursements from principal of trust
§ 3:135	Order setting hearing on life income beneficiary's petition for court to review and rule upon payment of disbursements from principal of trust
§ 3:136	Order authorizing trustee to make disbursements from principal of trust
§ 3:137	Transfer of trust funds to probate estate to satisfy decedent's debts and taxes
§ 3:138	Successor trustee's petition to transfer funds to decedent's probate estate for payment of decedent's debts
§ 3:139	Order setting trustee's petition to transfer funds from trust to decedent's probate estate for payment of legal debts
§ 3:140	Order approving successor trustee's petition to transfer funds to decedent's probate estate to pay legal debts

VI. TRUSTEES' ACCOUNTINGS

§ 3:141	Generally
§ 3:142	Settlement, objections, and hearings
§ 3:143	Nonjudicial settlement of accounts
§ 3:144	Trustee's notice of nonjudicial settlement of accounts
§ 3:145	Trustee's annual accounting and report
§ 3:146	—Notice of trustee's annual accounting and report
§ 3:147	—Waiver and consent to trustee's annual accounting and report by beneficiary
§ 3:148	—Order approving trustee's annual accounting and report
§ 3:149	Trustee's annual accounting format
§ 3:150	Memorandum to trust beneficiary regarding annual accounting of trust

- § 3:151 Trustee's final account and petition to settle and allow account and for authority to distribute trust corpus and close trust
- § 3:152 —Notice of final accounting and report of trustee to all persons interested in trust
- § 3:153 Trustee's final annual accounting format
- § 3:154 Trustee's final account and petition to settle and allow account and for authority to distribute trust corpus and close trust—Waiver and consent to trustee's final accounting by beneficiary
- § 3:155 Objections to trustee's accounting
- § 3:156 Order approving trustee's final account and authorizing distribution of trust corpus
- § 3:157 Memorandum to trust beneficiary regarding termination of trust
- § 3:158 Memorandum to trust beneficiary regarding basis information

VII. TRUSTEE AND ATTORNEY FEES

- § 3:159 Generally
- § 3:160 Petition for trustee and attorney's fees
- § 3:161 Order approving petition for trustee and attorney's fees

VIII. TERMINATING TRUST

- § 3:162 Generally
- § 3:163 Notice of trust termination (under \$75,000)
- § 3:164 Proposal to terminate trust
- § 3:165 Petition requesting court to exercise discretionary power and terminate trust
- § 3:166 Waiver and consent of beneficiary to termination of trust
- § 3:167 Order approving petition of trustee to terminate trust
- § 3:168 Receipt for trust distribution
- § 3:169 Trustee's supplemental report of distribution and petition for discharge
- § 3:170 Order approving supplemental report of distribution and discharging trustee

IX. PRIVATE TRUST ADMINISTRATION OF REVOCABLE TRUSTS

A. IN GENERAL

- § 3:171 Generally

TABLE OF CONTENTS

§ 3:172	Administration during settlor's lifetime
§ 3:173	Administration after settlor's demise
B. CLIENT INTERVIEW FORMS	
§ 3:174	Generally
§ 3:175	Information sheet for trust estate in which deceased settlor has surviving spouse
§ 3:176	Information sheet for trust estate in which deceased settlor was single individual
C. UTILIZATION OF TRUST ENGAGEMENT LETTER	
§ 3:177	Generally
§ 3:178	Engagement letter for representing successor trustee, in the administration and termination of trust after settlor's demise, listing services and charges
§ 3:179	Information memorandum to successor trustee
D. INFORMATION AND DIARY FORMS	
§ 3:180	Generally
§ 3:181	Sample trust information sheet
§ 3:182	Trust tickler
E. CHECKLIST AND PROCEDURES	
§ 3:183	Generally
§ 3:184	Checklist for trust administration
§ 3:185	Instructions for successor trustees as to administration of trust after settlor's demise, listing their duties and responsibilities
§ 3:186	Letter to trust beneficiaries if federal estate tax return is required
§ 3:187	Letter to trust beneficiaries if no federal estate tax is required
§ 3:188	Trustee's direction to personal representative
F. TRUST CERTIFICATION	
§ 3:189	Trust certification generally
§ 3:190	Certificate of trust existence and authority
G. REAL ESTATE TRANSACTIONS DURING SETTLOR'S LIFETIME	
§ 3:191	Generally

- § 3:192 Trustee's deed
- § 3:193 Sales disclosure form
- § 3:194 Memorandum of trust

CHAPTER 4. FUNDAMENTALS OF ESTATES PRACTICE

I. PRELIMINARY MATTERS

- § 4:1 Generally
- § 4:2 Information sheet—Estate with assets under exemption amount
- § 4:3 —Estate with assets over exemption amount
- § 4:4 Engagement letters discussion
- § 4:5 Simplified engagement letter setting forth hourly rate and general listing of services and charges
- § 4:6 Engagement letter for intestate administration situation, listing services and charges
- § 4:7 Engagement letter for supervised administration, listing services and charges
- § 4:8 Engagement letter for unsupervised administration, listing services and charges
- § 4:9 Information memorandum to personal representative

II. PROCEDURE CHECKLISTS

- § 4:10 Generally
- § 4:11 Checklist for supervised administration
- § 4:12 Checklist for unsupervised administration

III. INFORMATION AND TICKLER FORMS

- § 4:13 Generally
- § 4:14 Sample information sheet
- § 4:15 Tickler—Summarizing due and completion dates
- § 4:16 —Reminder of individual tasks

IV. FORMAL MATTERS; VERIFICATION OF PLEADINGS

- § 4:17 Generally
- § 4:18 Notarized verification
- § 4:19 Verification by affirmation
- § 4:20 Certificate of service—Ordinary mail
- § 4:21 —Certified mail
- § 4:22 —Electronic transmission

TABLE OF CONTENTS

- § 4:23 General form of order setting petition for hearing
- § 4:24 Proof of service of notice of hearing—By personal delivery
- § 4:25 General form of affidavit of mailing notice

V. DISPENSING WITH FORMAL ADMINISTRATION

A. TRANSFER OF PROPERTY

- § 4:26 Generally
- § 4:27 Remote and electronic notarization
- § 4:28 Affidavit to determine value of estate
- § 4:29 Discovery affidavit
- § 4:30 Small estate affidavit
- § 4:31 Affidavit for transfer of safe deposit box contents
- § 4:32 Affidavit for access to safe deposit box
- § 4:33 Affidavit for distribution of limited liability company account
- § 4:34 Affidavit for distribution of warrants (State Form 49377)
- § 4:35 Devolution affidavit for real estate
- § 4:36 Devolution affidavit for personal property
- § 4:37 Transfer affidavit by charitable organization beneficiary
- § 4:38 Transfer on death affidavit
- § 4:39 Heirs' quitclaim deed
- § 4:40 Affidavit for transfer of motor vehicle or watercraft
- § 4:41 Dispositions of treasury securities belonging to a decedent's estate being settled without administration
- § 4:42 Affidavit to obtain medical records
- § 4:43 Closing statement
- § 4:44 Order approving closing statement

B. SPREADING THE WILL ON THE RECORD

- § 4:45 Generally
- § 4:46 Petition
- § 4:47 Order spreading will of record
- § 4:48 Petitioning for appointment of personal representative after will has been spread of record
- § 4:49 Petition for appointment of personal representative after will was spread of record
- § 4:50 Order appointing personal representative after will was spread of record

C. DETERMINATION OF HEIRSHIP

- § 4:51 Discussion

- § 4:52 Petition to determine heirship
- § 4:53 Order fixing hearing
- § 4:54 Notice of hearing
- § 4:55 Decree determining heirship

VI. CEMETERY LOTS—THEIR SALE, USE AND TRANSFER

- § 4:56 Generally
- § 4:57 Specific bequest of cemetery lot—Unsupervised administration
- § 4:58 —Supervised administration
- § 4:59 Language vesting title in grave plot
- § 4:60 Title vesting under intestate estate
- § 4:61 Waiver of right to use of cemetery plot
- § 4:62 Waiver as to use of cemetery plot by surviving joint tenant
- § 4:63 Affidavit as to use of cemetery plot by individual entitled to use
- § 4:64 Affidavit regarding title to cemetery plots

CHAPTER 5. INITIAL STEPS AND PETITIONS WHEN OPENING AN ESTATE

I. JURISDICTIONAL ISSUES

- § 5:1 Jurisdiction
- § 5:2 Venue
- § 5:3 Petition for change of venue
- § 5:4 Petition for stay of proceedings
- § 5:5 Order staying proceedings
- § 5:6 Order determining venue

II. PETITIONS

A. FOR UNSUPERVISED ADMINISTRATION

- § 5:7 Generally
- § 5:8 Petition—Intestate estate
- § 5:9 —Testate estate
- § 5:10 Consent to unsupervised administration
- § 5:11 Consent to unsupervised administration on behalf of minor
- § 5:12 Notice of Filing of Petition for Unsupervised Administration

B. FOR SUPERVISED ADMINISTRATION

- § 5:13 Generally

TABLE OF CONTENTS

- § 5:14 Petition—Intestate estate
- § 5:15 —Testate estate

CHAPTER 6. APPOINTMENT OF PERSONAL REPRESENTATIVE

I. IN GENERAL

- § 6:1 Discussion
- § 6:2 Affidavit of qualifications of personal representative
- § 6:3 Application for appointment of personal representative
(Marion County)
- § 6:4 Consent to appointment of personal representative
(convicted felon)
- § 6:5 Order appointing personal representative—Supervised
administration
- § 6:6 —Unsupervised administration
- § 6:7 Nomination of resident agent by nonresident personal
representative
- § 6:8 Oath of personal representative
- § 6:9 Affirmation of personal representative
- § 6:10 Confidential form listing redacted information
- § 6:11 Notice of exclusion
- § 6:12 Letters testamentary
- § 6:13 Letters of administration
- § 6:14 Certification of letters

II. RENUNCIATION OF APPOINTMENT

- § 6:15 Generally
- § 6:16 Renunciation and nomination—Intestate estate—By
relative who is otherwise qualified to serve
- § 6:17 Nomination—Intestate estate—By nonresident relative
- § 6:18 Renunciation and nomination—Intestate estate—
Request that nominee serve with minimum bond
- § 6:19 Renunciation

III. BOND

- § 6:20 Generally
- § 6:21 Consent of beneficiary to minimum bond

IV. NOTICE OF APPOINTMENT

- § 6:22 Generally
- § 6:23 Notice of appointment of personal representative

- § 6:24 —Unsupervised administration
- § 6:25 Clerk's certificate of mailing—Supervised administration
- § 6:26 —Unsupervised administration
- § 6:27 Affidavit of mailing notice
- § 6:28 Request for notice of further proceedings

V. SUCCESSOR PERSONAL REPRESENTATIVES

- § 6:29 Generally
- § 6:30 Petition for appointment of successor personal representative
- § 6:31 Consent to appointment of successor personal representative
- § 6:32 Order appointing successor personal representative
- § 6:33 Petition for appointment of administrator C.T.A.
- § 6:34 Consent to appointment of administrator C.T.A.
- § 6:35 Order appointing administrator C.T.A.
- § 6:36 Petition to remove personal representative and appoint successor
- § 6:37 Order removing personal representative and appointing successor personal representative
- § 6:38 Petition to surcharge prior personal representative and forfeit bond
- § 6:39 Order requiring forfeiture of bond
- § 6:40 Will of decedent discovered after estate is opened as an intestate estate
- § 6:41 Petition for probating of decedent's will, appointment of personal representative named in will, issuance of letters testamentary and revocation of letters of administration
- § 6:42 Order revoking letters of administration, probating decedent's will, appointing personal representative, and issuing letters testamentary
- § 6:43 Petition for probate of will to transfer single asset
- § 6:44 Order probating will to transfer single asset

VI. APPOINTMENT OF SPECIAL ADMINISTRATOR

- § 6:45 Generally
- § 6:46 Petition for appointment of special administrator—No representative appointed
- § 6:47 —Removal of current representative
- § 6:48 —Conflict of interest
- § 6:49 Affidavit in support of petition for appointment of special administrator
- § 6:50 Order setting petition for hearing

TABLE OF CONTENTS

- § 6:51 Consent to appointment of special administrator
- § 6:52 Consent to payment of claim of personal representative
- § 6:53 Order appointing special administrator

VII. SUGGESTED INSTRUCTIONS FOR PERSONAL REPRESENTATIVES IN SUPERVISED AND UNSUPERVISED ESTATES

- § 6:54 Generally
- § 6:55 Form: Instructions to personal representative of supervised estate
- § 6:56 Form: Instructions to personal representative of unsupervised estate

VIII. ADMINISTRATION OF ABSENTEE'S ESTATE

- § 6:57 General procedure
- § 6:58 Petition for presumption that absentee individual is deemed dead
- § 6:59 Notice of hearing regarding presumption of death
- § 6:60 Order determining that absentee individual is deemed dead

CHAPTER 7. PROBATE AND PROOF OF WILLS

I. IN GENERAL

- § 7:1 Discussion
- § 7:2 Electronic wills
- § 7:3 Affidavit of death
- § 7:4 —Proof of will—By affidavit of subscribing witness
- § 7:5 — —Subscribing witness unavailable
- § 7:6 —Self-proved will
- § 7:7 Affidavit regarding original will offered for probate
- § 7:8 Affidavit of regularity
- § 7:9 Order probating will—Unsupervised administration
- § 7:10 —Supervised administration

II. COMPELLING PRODUCTION OF WILL

- § 7:11 Generally
- § 7:12 Written Demand for Production of Original Will
- § 7:13 Petition for order to produce will
- § 7:14 Order to produce will
- § 7:15 Submission of will to court

§ 7:16 Electronic submission of will to court

III. PROOF OF LOST OR DESTROYED WILL

§ 7:17 Generally

§ 7:18 Petition for probate of lost or destroyed will

§ 7:19 Affidavit regarding copy of will offered for probate

§ 7:20 Order probating lost or destroyed will

IV. OBJECTIONS TO PROBATE

§ 7:21 Generally

§ 7:22 Form of objections

CHAPTER 8. WILL CONTESTS

I. IN GENERAL

§ 8:1 Discussion

§ 8:2 Complaint in will contest

§ 8:3 Summons

§ 8:4 Notice of deposit of plaintiff's bond in will contest

§ 8:5 Securing information on nonprobate assets

§ 8:6 Petition for disclosure and recovery of estate assets

§ 8:7 Order on petition for disclosure and recovery of estate assets

§ 8:8 Motion to stay petition for disclosure and recovery of estate assets pending settlement negotiations

§ 8:9 Order on motion to stay petition for disclosure and recovery of estate assets pending settlement negotiations

II. COMPROMISE

§ 8:10 Generally

§ 8:11 Agreement—Will revoked and intestate distribution

§ 8:12 —To accept second of conflicting wills presented for probate

§ 8:13 —To accept original will presented for probate

§ 8:14 —Probating of decedent's will with modifications on nonprobate transfers and distributions among heirs at law and named beneficiaries under decedent's will

§ 8:15 Petition to approve agreement—Will revoked and intestate distribution

§ 8:16 Compromise agreement

§ 8:17 Petition to approve agreement—Conflicting wills presented for probate

TABLE OF CONTENTS

- § 8:18 Petition to approve agreement between beneficiaries under will and heirs at law
- § 8:19 Order setting hearing on petition to approve agreement
- § 8:20 —Appointing guardian ad litem
- § 8:21 Order approving agreement—Will revoked and intestate distribution
- § 8:22 —Ordering probate of one of conflicting wills
- § 8:23 Order approving agreement between beneficiaries under will and heirs at law

CHAPTER 9. COLLECTION AND ADMINISTRATION OF ESTATE PROPERTY

I. IN GENERAL; RECOVERY OF ASSETS

- § 9:1 Discussion
- § 9:2 Petition to disclose assets
- § 9:3 Order setting petition for disclosure for hearing
- § 9:4 Petition to recover assets
- § 9:5 Order setting petition to recover assets for hearing
- § 9:6 Order directing transfer of assets
- § 9:7 Petition requesting decedent's records
- § 9:8 Order setting petition to recover records for hearing
- § 9:9 Order directing turnover of decedent's records
- § 9:10 Petition to recover digital assets
- § 9:11 Order directing recovery of digital assets
- § 9:12 Alternative petition to recover digital assets
- § 9:13 Alternate order directing recovery of digital assets
- § 9:14 Letter requesting accounting
- § 9:15 Petition to compel accounting
- § 9:16 Order compelling accounting
- § 9:17 Petition to settle and allow account
- § 9:18 Objections to account
- § 9:19 Order approving petition to settle and allow account

II. COLLECTION FROM NONPROBATE ASSETS

- § 9:20 Generally
- § 9:21 Complaint to collect assets from multiple-party account
- § 9:22 Complaint to collect assets from trust
- § 9:23 Complaint to recover from nonprobate transferee

III. PROCEDURES AND FORMS FOR SECURING ASSET INFORMATION

- § 9:24 Discussion

- § 9:25 Letter for information on decedent's bank account from
personal representative
- § 9:26 Bank account information form
- § 9:27 Letter
- § 9:28 Letter for information on decedent's brokerage
accounts from personal representative
- § 9:29 Letter for information on decedent's mutual fund
holdings from personal representative
- § 9:30 Letter for information on decedent's annuity contract
from personal representative
- § 9:31 Letter for disclosure of digital asset information
- § 9:32 Authorization to release information to legal counsel
- § 9:33 Blanket authorization to release information to legal
counsel
- § 9:34 Statement of person claiming refund due a deceased
taxpayer
- § 9:35 Request for Taxpayer Advocate Service Assistance

IV. INVENTORY

- § 9:36 Discussion
- § 9:37 Form of inventory
- § 9:38 Confidential form listing redacted information
- § 9:39 Attorney's certificate of preparation of inventory
- § 9:40 Certification of inventory preparation by personal
representative

V. MODIFICATION OF COURT SUPERVISION

A. REVOCATION OF UNSUPERVISED ADMINISTRATION

- § 9:41 Generally
- § 9:42 Petition to revoke unsupervised administration
- § 9:43 Order revoking unsupervised administration

B. CONVERSION TO UNSUPERVISED ADMINISTRATION

- § 9:44 Petition
- § 9:45 Consent to conversion to unsupervised administration
- § 9:46 Order
- § 9:47 Notice of order

VI. REQUESTS FOR INSTRUCTIONS

- § 9:48 Petition for instructions—Determination of effect of
document signed by decedent

TABLE OF CONTENTS

- § 9:49 Order setting petition for instructions for hearing
- § 9:50 Order issuing instructions

VII. ABANDONMENT OF ESTATE PROPERTY

- § 9:51 Generally
- § 9:52 Petition to abandon property
- § 9:53 Consent of legatee or heir to abandonment of property
- § 9:54 Order authorizing representative to abandon property

VIII. CONTINUATION OF DECEDENT'S BUSINESS

- § 9:55 Generally
- § 9:56 Petition for permission to continue business
- § 9:57 Consent of legatee or heir to continue business
- § 9:58 Order granting permission to continue business
- § 9:59 Petition for authority to continue operating businesses of decedent
- § 9:60 Order authorizing personal representative to continue operating businesses of decedent

IX. PARTIAL DISTRIBUTIONS

A. IN GENERAL

- § 9:61 Discussion
- § 9:62 Petition for authority to make partial distributions—
During claims period
- § 9:63 Petition for authority to make partial distribution—
After claims period
- § 9:64 Beneficiary's consent to partial distribution
- § 9:65 Order authorizing partial distribution—Before
expiration of claims period
- § 9:66 —After claims period

B. TRANSFER OF POSSESSION OF REAL ESTATE TO DEVISEE

- § 9:67 Petition
- § 9:68 Consent to transfer
- § 9:69 Order

CHAPTER 10. TRANSFER OR SALE OF ESTATE PROPERTY

I. OVERVIEW; PERSONAL PROPERTY

- § 10:1 Generally

- § 10:2 Disposition of personal property
- § 10:3 Petition to sell personal property
- § 10:4 Beneficiary's consent to sale of personal property
- § 10:5 Order setting petition to sell personal property for hearing
- § 10:6 Notice of hearing on petition to sell personal property
- § 10:7 Order authorizing sale of personal property
- § 10:8 Petition for ratification of sale of personal property
- § 10:9 Order ratifying sale of personal property
- § 10:10 Letter of attorney authorizing out-of-state estate checking account
- § 10:11 Affidavit of domicile
- § 10:12 Limited power of attorney for personal property

II. REAL ESTATE

- § 10:13 Generally
- § 10:14 Survivorship affidavit for surviving spouse
- § 10:15 Survivorship affidavit after death of surviving spouse
- § 10:16 Survivorship affidavit for nonspouse
- § 10:17 Survivorship affidavit for remainderman after reserved life estate
- § 10:18 Survivorship affidavit for remainderman after bequeathed life estate
- § 10:19 Survivorship affidavit for transfer on death transfer
- § 10:20 Affidavit of devolution of real property
- § 10:21 Petition to sell real estate
- § 10:22 Beneficiary's consent to sale of real estate
- § 10:23 Order setting petition to sell real estate for hearing
- § 10:24 —Ordering notice by publication
- § 10:25 Notice of hearing on petition to sell real property
- § 10:26 —To unknown heirs
- § 10:27 Objection to sale
- § 10:28 Order authorizing sale
- § 10:29 Petition to amend order of sale
- § 10:30 Amended order of sale
- § 10:31 Petition to sell real estate for less than appraised value
- § 10:32 Order authorizing sale of real estate for less than appraised value
- § 10:33 Offer to purchase from estate
- § 10:34 Petition for authority to lease real estate
- § 10:35 Order authorizing lease
- § 10:36 Selling real estate to beneficiary who wishes to offset beneficial interest against purchase price of sale

TABLE OF CONTENTS

- § 10:37 Petition to sell real estate to beneficiary and offset distributive share against purchase price
- § 10:38 Offer to purchase real estate from estate and offset distributive share as part of purchase price
- § 10:39 Order authorizing sale of real estate to beneficiary
- § 10:40 Options granted with regard to purchase of real estate
- § 10:41 Exercise of option to purchase real estate granted under decedent's last will and testament
- § 10:42 Notice to personal representative or beneficiaries whose interest are affected by exercise of option on real estate
- § 10:43 Petition evidencing exercise of option granted under decedent's will to purchase real estate
- § 10:44 Order approving exercise of option granted individual to purchase real estate under decedent's will
- § 10:45 Nonexercise of option
- § 10:46 Petition to determine rights granted under option
- § 10:47 Order interpreting rights granted under option
- § 10:48 Limited power of attorney for real property

III. APPOINTMENT OF GUARDIAN TO REPRESENT MINOR BENEFICIARIES

- § 10:49 Generally
- § 10:50 Petition to appoint guardian for minor beneficiary
- § 10:51 Order appointing guardian—For hearing on petition to sell real property
- § 10:52 Guardian's answer

IV. OVERCOMING DIFFICULTIES SELLING PROPERTY

A. OBTAINING AUTHORIZATION TO PAY FOR REPAIRS

- § 10:53 Generally
- § 10:54 Petition to authorize expenditure of funds for repairs
- § 10:55 Order authorizing expenditure of funds for repairs
- § 10:56 Consent to repairs to real estate

B. OVERVALUATION OF PROPERTY

- § 10:57 Generally
- § 10:58 Petition
- § 10:59 Order authorizing new appraisal or valuation
- § 10:60 Appraisers' certificate of appointment and oath

C. TRANSFER TO TRUST FOR SUBSEQUENT SALE

- § 10:61 General discussion
- § 10:62 Trust agreement

V. PERSONAL REPRESENTATIVE'S DEEDS

- § 10:63 Generally
- § 10:64 Deed—Sale under court supervision
- § 10:65 —Sale pursuant to authority granted in will
- § 10:66 —Sale under unsupervised administration
- § 10:67 Sales disclosure form—Instructions
- § 10:68 Sales disclosure form
- § 10:69 Deed—Distribution under unsupervised administration

VI. DECEDENT'S EXECUTORY LAND CONTRACTS

A. COMPLETION OF SALE

- § 10:70 Generally
- § 10:71 Petition for permission to complete contract
- § 10:72 Order authorizing completion of sale contract
- § 10:73 Petition to expend estate funds to complete contract
- § 10:74 Consent to petition to expend estate funds to complete contract
- § 10:75 Order authorizing expenditure of estate funds to complete contract

B. SALE OF DECEASED SELLER'S INTEREST IN CONTRACT

- § 10:76 Generally
- § 10:77 Petition
- § 10:78 Beneficiaries' consent
- § 10:79 Beneficiaries' agreement that one beneficiary will purchase contract
- § 10:80 Order authorizing sale of land contract
- § 10:81 Deed conveying land subject to land contract
- § 10:82 Deed distributing land subject to land contract

C. TERMINATION OF CONTRACTS ENTERED INTO BY DECEDENT

- § 10:83 Generally
- § 10:84 Petition to terminate sale of real estate entered into

TABLE OF CONTENTS

- by decedent due to purchaser's default under terms of contract
- § 10:85 Order setting petition for termination of contract for sale of real estate for hearing
- § 10:86 Order terminating contract for sale of real estate due to purchaser's default
- § 10:87 Affidavit by purchaser of no equitable interest in real estate
- § 10:88 Quitclaim deed of any interest in real estate back to decedent's estate

VII. PARTITION

- § 10:89 Petition for partition
- § 10:90 Notice of partition
- § 10:91 Waiver of appointment of appraiser
- § 10:92 Appointment of appraiser
- § 10:93 Order referring matter to mediation
- § 10:94 Report of parties on agreement upon method of sale
- § 10:95 Order of auction
- § 10:96 Report on selection of auctioneer
- § 10:97 Notice of auction
- § 10:98 Personal representative's partition deed
- § 10:99 Report of sale
- § 10:100 Order distributing proceeds

Volume 25A

CHAPTER 11. CLAIMS AGAINST DECEDENTS' ESTATES AND NONPROBATE TRANSFEREES

I. NOTICE TO CREDITORS

- § 11:1 Discussion
- § 11:2 Form of notice for creditor served within one month of publication
- § 11:3 Form of notice for creditor not served within one month of publication
- § 11:4 Notice of petition for administration
- § 11:5 Personal representative's cover letter
- § 11:6 Attorney's cover letter to Medicaid Estate Recovery Program

II. COMPLIANCE WITH OBLIGATION TO ASCERTAIN CREDITORS

- § 11:7 Discussion
- § 11:8 Affidavit of personal representative regarding notification of creditors
- § 11:9 Affidavit of compliance of notice to creditors and due diligence
- § 11:10 Petition for order establishing compliance as to notice to creditors
- § 11:11 Order establishing compliance as to notice to creditors

III. FILING OF CLAIMS

- § 11:12 Generally
- § 11:13 Claim form

IV. ALLOWANCE OR TRIAL OF CLAIM

- § 11:14 Generally
- § 11:15 Motion to dismiss claim of notified creditor as untimely
- § 11:16 Motion to dismiss claim of unnotified creditor as untimely
- § 11:17 Order dismissing untimely claim
- § 11:18 Motion to dismiss claim of corporation not represented by an attorney
- § 11:19 Order dismissing claim of corporation not represented by an attorney
- § 11:20 Discovery motion in claims proceeding
- § 11:21 Certificate of service
- § 11:22 Order on discovery motion in claims proceeding

V. COMPROMISE OR DISMISSAL OF CLAIM

- § 11:23 Generally
- § 11:24 Request that paid or compromised claim be dismissed—By personal representative
- § 11:25 Claimant's dismissal of claim
- § 11:26 Petition for authority to compromise claim
- § 11:27 Order authorizing compromise of claim
- § 11:28 Claim of personal representative
- § 11:29 Affidavit of personal representative
- § 11:30 Consent of residuary beneficiary to payment of personal representative's claim
- § 11:31 Objections by beneficiary to payment of personal representative's claim

TABLE OF CONTENTS

§ 11:32 Consent of special administrator

VI. FORECLOSURE

§ 11:33 Generally

§ 11:34 Petition to stay tax sale

§ 11:35 Order staying tax sale

§ 11:36 Petition to require foreclosure or acceptance of deed

§ 11:37 Order requiring foreclosure or acceptance of deed

CHAPTER 12. DISCLAIMER OR ASSIGNMENT OF INTEREST IN ESTATE

I. DISCLAIMERS

A. IN GENERAL

§ 12:1 Discussion

§ 12:2 Disclaimer of intestate share

§ 12:3 Disclaimer of intestate share assets are less than
\$100,000 and no estate has been opened

§ 12:4 Disclaimer of devise of real property

§ 12:5 Disclaimer of devise of real property if no personal
representative will be appointed

§ 12:6 Disclaimer of specific bequest

§ 12:7 Disclaimer by survivor of jointly-held interest in joint
bank account or certificate of deposit

§ 12:8 Disclaimer of interest in joint brokerage account

§ 12:9 Disclaimer of interest in assets jointly-held,
disclaimer of assets as designated payee, plus
disclaimer of intestate share in decedent's estate

§ 12:10 Disclaimer of specific bequest from trust

§ 12:11 Disclaimer of interest in decedent's estate by
guardian

§ 12:12 Disclaimer of interest in decedent's estate by
beneficiary's personal representative

§ 12:13 Disclaimer of interest in retirement account by
beneficiary's personal representative

§ 12:14 Beneficiary's disclaimer of interest as designated
transferee upon death of account owner

§ 12:15 Disclaimer by named beneficiary of beneficial interest
as designated beneficiary of life insurance proceeds

§ 12:16 Certificate of service regarding disclaimer

§ 12:17 Certificate of service form for disclaimers

§ 12:18 Confidential form listing redacted information

§ 12:19 Notice of exclusion

**B. DISTRIBUTION GIVING EFFECT TO
DISCLAIMER**

- § 12:20 Generally
- § 12:21 Petition
- § 12:22 Order
- § 12:23 Distribution of estate and receipt

II. ASSIGNMENT OF INTERESTS IN ESTATE

- § 12:24 Generally
- § 12:25 Assignment of interest in personal property
- § 12:26 Assignment of interest in real property
- § 12:27 Assignment of specific bequest
- § 12:28 Assignment of intestate interest
- § 12:29 Assignment of residuary interest by trustee
- § 12:30 Assignment of interest in specific asset

**CHAPTER 13. SPOUSAL RIGHTS; FAMILY
ALLOWANCES AND SETTLEMENTS**

I. ELECTION TO TAKE AGAINST WILL

- § 13:1 Discussion
- § 13:2 Form of election by surviving spouse
- § 13:3 Form of election for surviving spouse by guardian

II. STATUTORY ALLOWANCE

- § 13:4 Generally
- § 13:5 Election of statutory allowance—By surviving spouse
- § 13:6 Decree allowing spouse statutory allowance
- § 13:7 Notice of election to take spousal allowance
- § 13:8 Waiver of statutory allowance—By surviving spouse
- § 13:9 Claim for statutory allowance—By guardian of
surviving spouse
- § 13:10 Decree allowing spouse statutory allowance claimed
by guardian
- § 13:11 Petition for statutory allowance—By guardian on
behalf of minor child
- § 13:12 Decree for allowance to minor dependent child
- § 13:13 Notice of compliance with decree

III. FAMILY SETTLEMENTS

- § 13:14 Generally

TABLE OF CONTENTS

- § 13:15 Form of settlement agreement
- § 13:16 Petition for order approving agreement
- § 13:17 Order approving agreement

CHAPTER 14. PAYMENT OF TAXES

I. INDIANA INHERITANCE TAX

- § 14:1 Generally

II. FEDERAL ESTATE TAX

- § 14:2 Introduction
- § 14:3 New developments
- § 14:4 Estate tax return
- § 14:5 Who is responsible for filing?
- § 14:6 Time when payment is due; extensions
- § 14:7 Recordkeeping requirements
- § 14:8 Who is responsible for paying tax?
- § 14:9 Application for extension of time to file return (Form 4768)
- § 14:10 Checklist of possible elections on federal estate tax return
- § 14:11 Instructions for federal estate tax return
- § 14:12 Information regarding beneficiaries acquiring property from a decedent (Form 8971)
- § 14:13 Schedule A—Information regarding beneficiaries acquiring property from a decedent (Schedule A, Form 8971)
- § 14:14 Instructions for Form 8971 and Schedule A
- § 14:15 Estate tax closing letter
- § 14:16 Estate tax closing document
- § 14:17 Power of attorney and declaration of representative
- § 14:18 Power of attorney form (Form 2848)

III. FEDERAL INCOME TAXES

- § 14:19 Generally
- § 14:20 Cover letter with application
- § 14:21 Application for employer identification number (Form SS-4)
- § 14:22 —Instructions
- § 14:23 Request for prompt assessment of income tax returns
- § 14:24 —Form 4810
- § 14:25 Gift tax returns for a decedent
- § 14:26 Gifts required to be reported on federal gift tax return

- § 14:27 Federal estate and gift tax exclusion amounts and rates—Historical overview

CHAPTER 15. ACCOUNTING AND CLOSING THE ESTATE

I. DISTRIBUTION OF ASSETS

A. IN GENERAL

- § 15:1 Discussion
- § 15:2 Personal representative's deed—To devisee or heir—
Unsupervised administration
- § 15:3 Affidavit of domicile for stock transfer
- § 15:4 Irrevocable stock or bond power
- § 15:5 Request for taxpayer identification number and
certification
- § 15:6 Lost certificate affidavit
- § 15:7 Affidavit of survivorship—By surviving joint tenant
—By surviving tenant by entireties
- § 15:9 Receipt
- § 15:10 Trustee's direction to personal representative
- § 15:11 Distribution of motor vehicle subject to lien
- § 15:12 Personal representative's assignment of interest in oil
and gas lease
- § 15:13 Assignment of interest in limited liability company
- § 15:14 Transfer under the Indiana Uniform Transfers to
Minors Act
- § 15:15 Petition to distribute to Uniform Transfers to Minors
Account
- § 15:16 Order approving petition to distribute to Uniform
Transfers to Minors Account

B. PETITION FOR INSTRUCTIONS REGARDING DISPOSITION

- § 15:17 Generally
- § 15:18 Petition requesting instructions regarding disposition
in will
- § 15:19 Order setting petition for construction of will for
hearing
- § 15:20 Order construing will

II. CLOSING STATEMENT IN UNSUPERVISED ESTATES

- § 15:21 Discussion

TABLE OF CONTENTS

- § 15:22 Status report
- § 15:23 Motion for extension of time to file closing statement
- § 15:24 Order granting motion for extension of time to file closing statement
- § 15:25 Closing statement—Intestate estate
- § 15:26 —Testate estate
- § 15:27 Notice of filing of verified closing statement
- § 15:28 Waiver of notice
- § 15:29 Objections to closing statement
- § 15:30 Order approving closing statement and closing estate

III. ACCOUNTING AND DISTRIBUTION BY SUPERVISED PERSONAL REPRESENTATIVE

A. INTERMEDIATE ACCOUNTING

- § 15:31 Generally
- § 15:32 Motion for extension of time to file final accounting and close estate
- § 15:33 Order granting motion for extension of time to file final accounting and close estate
- § 15:34 Intermediate accounting—Petition for approval without notice
- § 15:35 Order approving intermediate accounting—Without notice
- § 15:36 Intermediate accounting—Notice given beneficiaries—Request to approve partial distribution
- § 15:37 Notice of intermediate accounting
- § 15:38 Certificate of service by personal representative
- § 15:39 Waiver of notice and consent
- § 15:40 Order approving intermediate accounting, notice given, and partial distribution

B. FINAL ACCOUNTING AND SETTLEMENT OF ESTATE

- § 15:41 Discussion
- § 15:42 Final account in intestate estate
- § 15:43 Affidavit of heirship—To be used with final account in intestate estate
- § 15:44 Final account in testate estate
- § 15:45 Sample estate final accounting
- § 15:46 Affidavit in lieu of vouchers
- § 15:47 Consent to final accounting and waiver of notice and hearing on accounting
- § 15:48 Notice of final accounting

- § 15:49 Certificate of service by personal representative
- § 15:50 Objections to final accounting
- § 15:51 Order approving final accounting—Intestate estate
- § 15:52 —Testate estate
- § 15:53 Supplemental report
- § 15:54 Order approving supplemental report
- § 15:55 Sample supplemental accounting
- § 15:56 Distribution affidavit

C. DIRECTION TO FUND TESTAMENTARY TRUST AND CLOSE ESTATE

- § 15:57 Petition
- § 15:58 Order for hearing on petition
- § 15:59 Order requiring funding of trust and closing of estate

IV. TERMINATION OF REPRESENTATION AND FEES

- § 15:60 Discussion
- § 15:61 Motion to withdraw
- § 15:62 Order granting motion to withdraw
- § 15:63 Motion to substitute counsel
- § 15:64 Order granting motion to substitute counsel
- § 15:65 Petition for partial award of fees
- § 15:66 Order allowing partial payment of fees
- § 15:67 Petition for fees on closing of estate
- § 15:68 Order allowing fees on closing estate
- § 15:69 Petition for attorney's fee—Personal representative
not requesting compensation
- § 15:70 Order authorizing attorney's fee
- § 15:71 Motion for payment of fees
- § 15:72 Order granting motion for payment of fees

V. PAYMENT OF BENEFICIARY'S SHARE INTO COURT

- § 15:73 Generally
- § 15:74 Petition to pay missing beneficiary's share into court
- § 15:75 Petition to pay refused distribution into court
- § 15:76 Order authorizing payment of distribution into court

VI. LIABILITY OF PERSONAL REPRESENTATIVE AND DISTRIBUTEES

- § 15:77 Discussion

TABLE OF CONTENTS

- § 15:78 Residuary beneficiary's agreement—To assume contingent tax liabilities
- § 15:79 Complaint against distributee of unsupervised estate
- § 15:80 Third-party complaint—By distributee of unsupervised estate—For contribution by other distributees
- § 15:81 Complaint against unsupervised personal representative—By claimant in estate

VII. ADMINISTRATION OF SUBSEQUENTLY DISCOVERED PROPERTY

- § 15:82 Discussion
- § 15:83 Petition for permission to distribute subsequently discovered assets—No need for further administration
- § 15:84 Order authorizing distribution of subsequently discovered assets
- § 15:85 Petition to reopen estate
- § 15:86 Order to reopen estate and reappoint personal representative

VIII. SUMMARY CLOSING OF INSOLVENT ESTATES

- § 15:87 Discussion
- § 15:88 Petition to summarily close supervised estate
- § 15:89 Order summarily closing estate
- § 15:90 Closing statement—Insolvent, unsupervised estate
- § 15:91 Order closing insolvent, unsupervised estate

CHAPTER 16. WRONGFUL DEATH ESTATES

- § 16:1 Discussion
- § 16:2 Petition to appoint special administrator—To prosecute wrongful death action
- § 16:3 Consent of interested person to appointment of special administrator and waiver of notice
- § 16:4 Order setting hearing on petition for appointment of special administrator
- § 16:5 Notice on petition to appoint special administrator
- § 16:6 Order appointing special administrator—To prosecute wrongful death action
- § 16:7 Petition for authority to settle wrongful death claim
- § 16:8 Order authorizing settlement of wrongful death claim
- § 16:9 Form of release

- § 16:10 Final accounting by special administrator
- § 16:11 Decree approving final accounting

CHAPTER 17. ANCILLARY ADMINISTRATION

I. FILING OF EVIDENCE OF AUTHORITY

- § 17:1 Discussion
- § 17:2 Petition to place evidence of appointment on file
- § 17:3 Order placing evidence on file
- § 17:4 Notice of disposition

II. COLLECTION OF PROPERTY

- § 17:5 Discussion
- § 17:6 Affidavit for collection of personal property
- § 17:7 Notice by resident creditor—To prevent delivery of
property to domiciliary foreign personal
representative

III. APPOINTMENT OF LOCAL PERSONAL REPRESENTATIVE

- § 17:8 Discussion
- § 17:9 Petition for appointment of local personal
representative—At request of domiciliary foreign
personal representative
- § 17:10 Order appointing local personal representative
- § 17:11 Petition for appointment of local personal
representative—Termination of domiciliary foreign
personal representative's authority
- § 17:12 Order appointing local personal representative—
Terminating authority of domiciliary foreign
personal representative

APPENDICES

- Appendix A. Title 6. Taxation
- Appendix B. Title 29. Probate
- Appendix C. Title 30. Trusts and Fiduciaries
- Appendix D. Title 31. Family Law and Juvenile Law
- Appendix E. Title 32. Property
- Appendix F. Title 34. Civil law and Procedure

Table of Laws and Rules

TABLE OF CONTENTS

Table of Cases

Index