

NEWS RELEASE

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Supreme Court of Pennsylvania
**Orphans' Court Rule and Forms
Enhance Administration of Trusts and Estates**

HARRISBURG, March 29, 2007 — A more uniform and understandable way for people or institutions appointed by a judge to administer a trust fund, or the dealings of someone who's deceased, was put into effect today by the Supreme Court of Pennsylvania.

The Supreme Court amended Orphans' Court Procedural Rule 6.1, revised several existing forms, and created a new one for use by fiduciaries, or those who are required to regularly provide a history of the transactions of a trust or estate.

"The exceptional efforts of the Orphans' Court Procedural Rules Committee produced several new forms that will result in greater efficiency and public understanding of the complex administrative issues inherent in many of the cases that come into our state judicial system," Chief Justice of Pennsylvania Ralph J. Cappy said. "On behalf of the Court, I commend the Committee for its outstanding achievements. Our successes in statewide automation, along with rule changes that make many administrative requirements such as these Orphans' Court forms available online for the first time, underscore the Pennsylvania Judiciary's commitment to meet present and future challenges."

Though models of such accountings are an integral part of Orphans' Court proceedings and have long been used as guides, today's Supreme Court order requires statewide use of forms of account that are consistent with the model forms — except upon special order of the court. Standardization assists the Orphans' Court when there is a need to review multiple accounts, and it also enhances a beneficiary's understanding of how a fiduciary is handling the affairs of a trust or estate.

Paving the way for the change was the Orphans' Court Procedural Rules Committee, an advisory body to the Supreme Court that has spent the last 18 months reviewing and developing proposed revisions and forms. The work is consistent with the Committee's tradition of applying its expertise in helping to develop more efficient and user-friendly procedures for estate and trust matters. The Committee has been in the vanguard in these issues, and frequently, their developments are used as guides by other court systems and referenced in law-related scholarly publications.

(MORE)

Today’s action marks the Supreme Court’s third significant Orphans’ Court rule improvement within a year. The Supreme Court adopted new rules last fall to ease the burden of people who adopt children from another country by creating a standardized registration process and making those forms available online. Another enhancement was the approval of new statewide forms — which also are available for the first time online — that fell into four defined categories: audit and administration; guardianship; abortion control act and register of wills. All of the rule changes were recommended by the Orphans Court Rules committee.

Committee members include: Chester County President Judge Paula Francisco Ott; Montgomery County Judge Calvin S. Drayer Jr.; Mary Jane Barrett, Esq., Philadelphia; Kristen M. Del Sole, Esq., Pittsburgh; Richard E. Flannery, Esq., Lawrence County; Michael L. Mixell, Esq., Berks County; Shari J. Odenheimer, Esq., Wilmington, DE, and Carolyn Crandall Thompson, Esq., Dauphin County. Dean R. Phillips, Esq., is the committee’s chief counsel.

(Links: [order](#), [rule](#), [forms](#))

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