

**NOTICE OF CHARITABLE GIFT**

(In Accordance with Pa. O.C. Rule 5.5)

COURT OF COMMON PLEAS OF

\_\_\_\_\_ COUNTY, PENNSYLVANIA

ORPHANS' COURT DIVISION

ESTATE OF \_\_\_\_\_,  SETTLOR  DECEASED

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

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

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

Dear Sir or Madam:

Notice is given of a charitable gift as follows:

1. The nature of the present proceeding is:

(a) An Account which has been or will be listed for Audit in the Orphans' Court on

\_\_\_\_\_, 20\_\_\_\_, 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) If the proceedings are other than an Account, state the nature of the proceedings and the place, date and time fixed for hearing:

\* If more space is required, attach additional sheets.

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

2. Charitable gifts are made as follows:

(a) Give full names and addresses of charities, and names and addresses of counsel, if any.

(b) If pecuniary legacies, state exact amounts and indicate whether legacies will be or have been paid in full; if not give reasons therefor.

(c) If the charitable interest is a future interest and the estimated present value of the property involved exceeds \$25,000, a brief description thereof including the conditions precedent to its vesting in enjoyment and possession, the names and ages of persons known to have interests preceding such charitable interest, and the approximate market value of the property involved.

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



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,

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Attorney's Name and Supreme Court I.D. No.*

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

\_\_\_\_\_  
*Attorney's Telephone*