



PRINCIPAL'S ESTATE

(Under Power of Attorney)

COURT OF COMMON PLEAS OF
INDIANA COUNTY, PENNSYLVANIA
ORPHANS' COURT DIVISION

ESTATE OF Sara Watt, PRINCIPAL

ACCOUNT OF Daniel Robert Harris, Sr., David James Clark, Jr., Michael Andrew Smith, Sr.
., Jessica Marie Brown, Jr., Emily Ann Wilson, Sr., zetaConsulting, sigmaEn
terprises, lambdaGroup, thetaCorporation, omicronSolutions, GUARDIANS

No. 12-24-2001

PETITION FOR ADJUDICATION /
STATEMENT OF PROPOSED DISTRIBUTION
PURSUANT TO Pa. O.C. RULE 2.4

This form shall be used in all cases involving the Audit or Confirmation of the Account of a Guardian of the Estate of an incapacitated person. If space is insufficient, riders may be attached. Attach the papers required under items 3, 4 and 9, as applicable, and any additional decree or instrument pertinent to the adjudication.

INCLUDE ATTACHMENTS AT THE BACK OF THIS FORM.

Name of Counsel:	<u>Rihan Benjamin Miles, Jr.</u>
Supreme Court I.D. No.:	<u></u>
Name of Law Firm:	<u>ultraConsulting</u>
Address:	<u>Riverside Drive, Suite 101</u> <u>Kansas City, MO 64101</u>
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E-mail:	<u>rihan.miles@business.com</u>

PETITION FOR ADJUDICATION

Estate of **Sara Watt**, Principal

1. Name(s) and address(es) of Petitioner(s):

Petitioner:	Petitioner:
Name: David James Clark, Jr.	Daniel Robert Harris, Sr.
Address: Pine Street	Willow Drive
San Francisco, CA 94102	Dallas, TX 75201

Name(s) and address(es) of Agent(s) (if not Petitioner(s))

Agent:	Agent:
Name: Emily Rose Martinez	Kris Van Lee
Address: Birch Lane	Elm Street
Denver, CO 80203	Seattle, WA 98101

Identify any Agents who have not joined in the Petition for Adjudication/Statement of Proposed Distribution and/or the Account and state reason:

2. Name and address of Principal (and, if applicable, of any guardian appointed for Principal, of each personal representative for any Principal or Agent who has died, and of his or her counsel, identifying the capacity of each):

Judicial District or County where Principal resides, or if Principal is deceased, where Letters were issued: **Indiana County, PA**

3. A. Date of Principal's Power of Attorney under which agent(s) acted:

B. Date Agent(s) first exercised control of Principal's assets under Power of Attorney:

(Attach copy of each different Power of Attorney granted to Agent(s) by Principal and copy of any Decree involving Agent(s) for Principal).

Continuation of Question 1

(Additional Petitioner)

Name: **Emily Ann Wilson, Sr.**

Address: **Cedar Lane, Floor 5**

New York, NY 10001

Name: **Michael Andrew Smith, Sr.**

Address: **Oak Street, Downtown Plaza**

Atlanta, GA 30305

Name: **Jessica Marie Brown, Jr.**

Address: **Maple Avenue, Suite 200**

Chicago, IL 60610

PETITION FOR ADJUDICATION

Estate of **Sara Watt** _____, Principal

4. A. Explain the reason for filing this Account (if Principal or Agent has died, state date of death, and attach a Short Certificate; if Principal has been adjudicated incapacitated, state date of Decree, and attach a copy):

- B. Is this the first accounting for this Principal's estate? ☐ Yes ☐ No

If not, identify prior accountings, the accounting periods covered, and the dates of adjudication of the prior accountings.

5. Describe all gifts/transfers for less than full and adequate consideration made under the Power of Attorney. Identify each recipient's name, address, and relationship to Principal and/or Agent, amount of each gift/transfer, nature of each (cash or kind), and date made, with any additional explanation deemed appropriate (*if none, so state*):

6. Identify every asset or interest (include title or registration and value) of Principal known to Petitioner(s) and not identified in Account, whether or not in possession or control of Petitioner(s) (*if none known, so state*):

Description

Value

PETITION FOR ADJUDICATION

Estate of **Sara Watt**, Principal

7. Identify each existing safe deposit box of or for Principal and each one closed by Agent(s) (if not applicable, so state):

<i>Institution & Address</i>	<i>Box No.</i>	<i>Title or Registration</i>	<i>Date Closed (if applicable)</i>
First National Bank, 123 Main St, Springfield, IL 62701	A1024	Sara Watt - Sole Owner	11/15/2024

Are the entire contents of each safe deposit box identified in item 7,
above, included in the filed Account? ☐ Yes ☐ No
If not, explain:

8. A. Identify each known unpaid claim against Principal or Principal's Estate and describe each in detail (if none, so state):

Description

Amount

- B. Describe in detail any questions requiring adjudication and state the position of the Petitioner(s) as to each question:

PETITION FOR ADJUDICATION

Estate of **Sara Watt**, Principal

- C. If fees are being claimed by the Agent or an attorney, state amount and the period covered for the requested fees:

9. Written Notice of the Account's filing as required by Pa. O.C. Rule 2.5 has been or will be given to each interested party in the matter. In addition, notice of any known unpaid claim not admitted, all questions requiring adjudication, and any requested fees as described in item 8 above has been or will be given to all parties affected thereby.
- A. If Notice has been given, attach a copy of the Notice as well as a list of the names and addresses of the parties receiving such Notice.
- B. If Notice is yet to be given, a copy of the Notice as well as a list of the names and addresses of the parties receiving such Notice shall be submitted at the Audit or filed before the date of the last day for filing objections in counties without separate Orphans' Court Divisions together with a statement executed by a Petitioner or counsel certifying that such Notice has been given.
- C. If any such interested party is not sui juris (e.g., minors or incapacitated persons), Notice of the Account's filing has been or will be given to the appropriate representative on such party's behalf as required by Pa. O.C. Rule 4.2.
10. List all parties of whom Petitioner(s) has/have notice or knowledge, having or claiming any interest in the Principal's estate. This list shall:

- A. State each party's relationship to the Principal and the nature of each party's interest(s):

<i>Initials</i>	<i>Name and Address of Each Interested Party</i>	<i>Relationship and Comments, if any</i>	<i>Interest</i>
	Alexander James Henderson, Sr. Pine Street Suite 12A Seattle, WA 98101	Grandson Sample comment test1	15
	Sophia Marie Thompson, Jr. Lake Shore Drive Apt 21B Chicago, IL 60611	Mother Sample comment test2	5

See continuation schedule attached

PETITION FOR AJUDICATION

Beneficiaries or Heirs
(continuation of Question #10A)

Estate of Sara Watt, Principal

<i>Initials</i>	<i>Name and Address of Each Interested Party</i>	<i>Relationship and Comments, if any</i>	<i>Interest</i>
	Matthew Joseph White, Sr. Main Street Office 45B Seattle, WA 98101	Nephew	25
	Olivia Elizabeth Garcia, Jr. Sunset Boulevard Penthouse 1A Phoenix, AZ 85003	Niece	10
	Isabella Natalie Rodriguez, Jr. Hilltop Drive Unit 7F Denver, CO 80202	Sister	15
	Christopher Daniel Lee, Sr. Broadway Avenue Suite 300 Los Angeles, CA 90001	Son	10
	Sophia Grace Martinez, Jr. Lakeview Street Apt 12C Miami, FL 33101	Spouse	20

PETITION FOR ADJUDICATION

Estate of Sara Watt, Principal

- B. Identify each party who is not *sui juris* (e.g., minors or incapacitated persons). For each such party, give date of birth, the name of each Guardian and how each Guardian was appointed. If no Guardian has been appointed, identify the next of kin of such party, giving the name, address and relationship of each.

Party: Jane Doe; Date of Birth: 2012-07-15; Status: Minor; Guardian: Mary Doe (Mother), Appointed as Natural Guardian (no formal court appointment); Next of Kin: None.

Party: John Smith; Date of Birth: 1945-03-02; Status: Incapacitated; Guardian: None; Next of Kin: Susan Smith, 123 Main Street, Philadelphia, PA 19107 (Daughter); Robert Smith, 456 Oak Lane, Pittsburgh, PA 15213 (Son).

- C. State why a Petition for Guardian/Trustee *Ad Litem* has or has not been filed (see Pa. O.C. Rule 5.5).

A Petition for Guardian Ad Litem has been filed for Jane Doe (minor) and John Smith (incapacitated), as neither had a court-appointed guardian authorized to represent them in these proceedings. The petition was necessary under Pa. O.C. Rule 5.5 to ensure proper representation of their interests.

11. If prescribed by local rule as permitted by Pa. O.C. Rule 2.9, is the Court being asked to direct the filing of a Schedule of Distribution? ☐ Yes ☐ No

PETITION FOR ADJUDICATION

Estate of **Sara Watt**, Principal

Wherefore, your Petitioner(s) ask(s) that distribution be awarded to the parties entitled and suggest(s) that the distributive shares of income and principal (residuary shares being stated in proportions, not amounts) are as follows:

A. Income:

<i>Proposed Distributee(s)</i>	<i>Amount</i>	<i>Proportion</i>
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See attached schedule

B. Principal:

<i>Proposed Distributee(s)</i>	<i>Amount</i>	<i>Proportion</i>
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Submitted By:

(All petitioners must sign. Place additional signatures on attachment if necessary):

Corporate Fiduciary (if applicable)

Name of Corporate Fiduciary

Name of Representative and Title

Signature of Officer/Representative

Name of Petitioner

Signature of Petitioner

Name of Petitioner

Signature of Petitioner

PETITION FOR AJUDICATION

Proposed Distributions of Income (continuation of Page 7)

Estate of **Sara Watt**

, Principal

A. Income:

Proposed Distributee(s)

Amount Proportion

- 1 **Sophia Marie Thompson, Jr.**
- 2 **Isabella Natalie Rodriguez, Jr.**
- 3 **Christopher Daniel Lee, Sr.**
- 4 **Sophia Grace Martinez, Jr.**

PETITION FOR ADJUDICATION

Estate of **Sara Watt** _____, Principal

(Verification must be by **at least one** petitioner.)

Verification for Individual Petitioner

The undersigned hereby verifies that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

Date

Signature of Petitioner

David James Clark, Jr.

Verification for Corporate Petitioner

The undersigned hereby verifies that _____ is *title* _____ of the above-named *name of corporation* _____ and that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

Date

Signature of Representative for Corporate Petitioner

Certification of Counsel

The undersigned counsel hereby certifies that the foregoing Petition for Adjudication/ Statement of Proposed Distribution is a true and accurate reproduction of the form Petition authorized by the Supreme Court, and that no changes to the form have been made beyond the responses herein.

Date

Signature of Counsel for Petitioner

Rihan Benjamin Miles, Jr.

PETITION FOR ADJUDICATION

Estate of Sara Watt, Principal

Verification for Individual Petitioner

The undersigned hereby verifies that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

Date

Signature of Petitioner
Daniel Robert Harris, Sr.

Verification for Individual Petitioner

The undersigned hereby verifies that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

Date

Signature of Petitioner
Emily Ann Wilson, Sr.

Verification for Individual Petitioner

The undersigned hereby verifies that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

Date

Signature of Petitioner
Michael Andrew Smith, Sr.

Verification for Individual Petitioner

The undersigned hereby verifies that the averment of facts set forth in the foregoing Petition for Adjudication/Statement of Proposed Distribution which are within the personal knowledge of the Petitioner are true, and as to facts based on the information of others, the Petitioner, after diligent inquiry, believes them to be true; and that any false statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

Date

Signature of Petitioner

Jessica Marie Brown, Jr.