



## GUARDIANSHIP OF INCAPACITATED PERSON

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

ESTATE OF Sara Watt, AN INCAPACITATED PERSON

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

No. 22-23-1234

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 2 and 5, as applicable, and any additional decree or instrument pertinent to the adjudication.*

**INCLUDE ATTACHMENTS AT THE BACK OF THIS FORM.**

Name of Counsel: Ethan Benjamin Walker, Jr.

Supreme Court I.D. No.: \_\_\_\_\_

Name of Law Firm: sigmaConsulting

Address: Riverside Drive, Suite 101  
Kansas City, MO 64101

Telephone: (816) 555-4321

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E-mail:

ethan.walker@business.com

## PETITION FOR ADJUDICATION

Estate of Sara Watt, An Incapacitated Person

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

Petitioner:	Petitioner:
Name: <u>Michael Andrew Smith, Sr.</u>	<u>David James Clark, Jr.</u>
Address: <u>Oak Street</u>	<u>Pine Street</u>
<u>Atlanta, GA 30305</u>	<u>San Francisco, CA 94102</u>

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

2. Judicial District or County issuing Adjudication of Incapacity: Indiana County, PA

Date of Adjudication of Incapacity: \_\_\_\_\_

Date of Appointment as Guardian: \_\_\_\_\_

Attach copy(ies) of Decree(s).

3. A. Explain the reason for filing this Account (if incapacitated person has died, state date of death, name and address of personal representative and of his or her counsel and attach a Short Certificate if available. If incapacitated person has been adjudged to have regained capacity, state date of Decree. If Account is filed for any other reason, state address of incapacitated person):

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

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

4. A. Identify each unpaid claim against the minor or the minor's estate and describe in detail (*if none, so state*):



## Continuation of Question 1

(Additional Petitioner)

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

Address: **Maple Avenue, Suite 200**

**Chicago, IL 60610**

Name: **Daniel Robert Harris, Sr.**

Address: **Willow Drive, Suite 500**

**Dallas, TX 75201**

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

Address: **Cedar Lane, Floor 5**

**New York, NY 10001**

# PETITION FOR ADJUDICATION

Estate of **Sara Watt**, An Incapacitated Person

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

C. If guardian or attorney fees are being claimed, state amount and the period covered for the requested fees:

<i>Amount</i>	<i>Date Begin</i>	<i>Date End</i>
<b>1,000.00</b>	<b>01/01/2023</b>	<b>01/31/2023</b>
<b>2,500.50</b>	<b>02/15/2023</b>	<b>03/15/2023</b>
<b>750.75</b>	<b>03/10/2023</b>	<b>04/10/2023</b>

5. Written Notice of the Account's filing as required by Pa. O.C. Rule 2.5 has been or will be given to all interested parties listed in item 6 below. In addition, notice of any known unpaid claim not admitted, all questions requiring adjudication and any requested fees as discussed in item 4 above has been or will be given to all persons 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.

# PETITION FOR ADJUDICATION

Estate of **Sara Watt**, An Incapacitated Person

6. List all parties of whom Petitioner(s) has/have notice or knowledge, having or claiming any interest in the estate, including the incapacitated person's heirs at law. This list shall:

A. State each party's relationship to the incapacitated person and the nature of each party's interest(s);

Initials	Name and Address of Each Interested Party	Relationship and Comments, if any	Interest
	<b>Christopher Daniel Lee, Sr.</b> <b>Broadway Avenue</b> <b>Suite 300</b> <b>Los Angeles, CA 90001</b>	<b>Son</b> <b>Sample comment test1</b>	<b>10</b>
	<b>Olivia Elizabeth Garcia, Jr.</b> <b>Sunset Boulevard</b> <b>Penthouse 1A</b> <b>Phoenix, AZ 85003</b>	<b>Niece</b> <b>Sample comment test2</b>	<b>10</b>
	<b>Matthew Joseph White, Sr.</b> <b>Main Street</b> <b>Office 45B</b> <b>Seattle, WA 98101</b>	<b>Nephew</b>	<b>25</b>
	<b>Isabella Natalie Rodriguez, Jr.</b> <b>Hilltop Drive</b> <b>Unit 7F</b> <b>Denver, CO 80202</b>	<b>Sister</b>	<b>15</b>

**See continuation schedule attached**

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.

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

7. 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 AJUDICATION

Beneficiaries or Heirs  
(continuation of Question #6A)

Estate of **Sara Watt**

, An Incapacitated Person

<i>Initials</i>	<i>Name and Address of Each Interested Party</i>	<i>Relationship and Comments, if any</i>	<i>Interest</i>
	<b>Alexander James Henderson, Sr.</b> <b>Pine Street</b> <b>Suite 12A</b> <b>Seattle, WA 98101</b>	<b>Grandson</b>	<b>15</b>
	<b>Sophia Marie Thompson, Jr.</b> <b>Lake Shore Drive</b> <b>Apt 21B</b> <b>Chicago, IL 60611</b>	<b>Mother</b>	<b>5</b>
	<b>Sophia Grace Martinez, Jr.</b>	<b>Spouse</b>	<b>20</b>

# PETITION FOR ADJUDICATION

Estate of **Sara Watt**, An Incapacitated Person

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>
<b>Matthew Joseph White, Sr.</b>	<b>23,000.00</b>	<b>25.0000 %</b>
<b>Isabella Natalie Rodriguez, Jr.</b>	<b>18,000.00</b>	<b>35.0000 %</b>
<b>Sophia Marie Thompson, Jr.</b>	<b>34,000.00</b>	<b>20.0000 %</b>
<b>Sophia Grace Martinez, Jr.</b>	<b>20,000.00</b>	<b>20.0000 %</b>

**See continuation schedule attached**

## 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

**Michael Andrew Smith, Sr.**

\_\_\_\_\_  
Name of Petitioner

\_\_\_\_\_  
Signature of Petitioner

**David James Clark, Jr.**

\_\_\_\_\_  
Name of Petitioner

\_\_\_\_\_  
Signature of Petitioner



# PETITION FOR AJUDICATION

## Proposed Distributions of Income (continuation of Page 5)

Estate of **Sara Watt**

, An Incapacitated Person

A. Income:

*Proposed Distributee(s)*

*Amount*

*Proportion*

1 **Olivia Elizabeth Garcia, Jr.**

**25,000.00**

**23.0000 %**

Individual Fiduciary

**Jessica Marie Brown, Jr.**

\_\_\_\_\_  
Name of Petitioner

\_\_\_\_\_  
Signature of Petitioner

Individual Fiduciary

**Daniel Robert Harris, Sr.**

\_\_\_\_\_  
Name of Petitioner

\_\_\_\_\_  
Signature of Petitioner

Individual Fiduciary

**Emily Ann Wilson, Sr.**

\_\_\_\_\_  
Name of Petitioner

\_\_\_\_\_  
Signature of Petitioner

# PETITION FOR ADJUDICATION

Estate of Sara Watt, An Incapacitated Person

(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

**Michael Andrew Smith, Sr.**

## 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

**Ethan Benjamin Walker, Jr.**

# PETITION FOR ADJUDICATION

Estate of **Sara Watt** \_\_\_\_\_, An Incapacitated Person

## 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 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.**

## 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).

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Date

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Signature of Petitioner

**Emily Ann Wilson, Sr.**