

**GUARDIANSHIP OF MINOR**

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

ESTATE OF Sara Watt, A MINOR

ACCOUNT OF Michael Andrew Smith, Sr., David James Clark, Jr., Jessica Marie Brown, Jr.
Daniel Robert Harris, Sr., Emily Ann Wilson, Sr., 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 a minor or late minor. 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:	<u>Ethan Benjamin Walker, Jr.</u>
Supreme Court I.D. No.:	<u></u>
Name of Law Firm:	<u>sigmaConsulting</u>
Address:	<u>Riverside Drive, Suite 101</u> <u>Kansas City, MO 64101</u>
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PETITION FOR ADJUDICATION

Estate of **Sara Watt**, A Minor

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

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

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 Appointment as Guardian: _____
Attach copy(ies) of Decree(s).

3. A. Explain the reason for filing this Account (if minor has come of age, state date minor attained majority).

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

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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>
1,000.00	01/01/2023	01/31/2023
2,500.50	02/15/2023	03/15/2023
750.75	03/10/2023	04/10/2023

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.

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

A. State each party's relationship to the minor or late minor and the nature of each party's interest(s);

Initials	Name and Address of Each Interested Party	Relationship and Comments, if any	Interest
	Christopher Daniel Lee, Sr. Broadway Avenue Suite 300 Los Angeles, CA 90001	Son Sample comment test1	10
	Olivia Elizabeth Garcia, Jr. Sunset Boulevard Penthouse 1A Phoenix, AZ 85003	Niece Sample comment test2	10

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

Beneficiaries or Heirs
(continuation of Question #6A)

Estate of **Sara Watt**

, A Minor

<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
	Isabella Natalie Rodriguez, Jr. Hilltop Drive Unit 7F Denver, CO 80202	Sister	15
	Alexander James Henderson, Sr. Pine Street Suite 12A Seattle, WA 98101	Grandson	15
	Sophia Marie Thompson, Jr. Lake Shore Drive Apt 21B Chicago, IL 60611	Mother	5
	Sophia Grace Martinez, Jr.	Spouse	20

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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>
Matthew Joseph White, Sr.	23,000.00	25.0000 %
Alexander James Henderson, Sr.	18,000.00	35.0000 %
Sophia Marie Thompson, Jr.	34,000.00	20.0000 %
Sophia Grace Martinez, Jr.	20,000.00	20.0000 %

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**, A Minor

A. Income:

	<i>Proposed Distributee(s)</i>	<i>Amount</i>	<i>Proportion</i>
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, A Minor

(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** _____, A Minor

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).

Date

Signature of Petitioner

Emily Ann Wilson, Sr.