



PETITION FOR ADJUDICATION

DECEDENT'S ESTATE

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

ESTATE OF Sara Watt, DECEASED

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 Decedent's Estate. If space is insufficient, riders may be attached. Attach the papers required under items 1, 2, 4, 8, 10, 16-19, as applicable, and any 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> |
| Telephone: | <u>(816) 555-4321</u> |
| Fax: | <u>(816) 888-6543</u> |
| Email: | <u>ethan.walker@business.com</u> |

PETITION FOR ADJUDICATION

Estate of **Sara Watt**, Deceased

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 executors or administrators who have not joined in the Petition for Adjudication and Statement of Proposed Distribution and Account and state reason:

Is this the first accounting by this fiduciary? ☐ Yes ☐ No

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

Pursuant to 20 Pa.C.S. § 3501.2, if property from a trustee, guardian, or agent acting under a power of attorney is being received into the estate, an Account of the administration of such trust, guardianship, or principal's estate may be annexed to the Estate Account. Is any such Account annexed to this Estate Account? ☐ Yes ☐ No

If so, the annexed Account and the appropriate fully completed Petition for Adjudication/Statement of Proposed Distribution for the annexed matter should be filed as Exhibits to this Petition.

2. Decedent died on **12/05/2023**

☐ Letters Testamentary or ☐ Letters of Administration were granted to Petitioner(s) on

Date of Will (if applicable): **10/26/2015**

Date(s) of Codicil(s) (if applicable): **02/17/2023 02/20/2023 02/26/2023**

Date of probate (if different from date Letters granted): _____

Was a bond required? ☐ Yes ☐ No. If yes, state amount: _____

Are proofs of advertising of the grant of Letters attached? ☐ Yes ☐ No

Dates of advertising of the grant of Letters:

(Additional Petitioner)

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**, Deceased

3. Was decedent survived by a spouse? ☐ Yes ☐ No

If yes, name of the surviving spouse: _____

4. Has the surviving spouse filed to take an elective share? ☐ Yes ☐ No ☐ N/A
(see 20 Pa.C.S. § 2201 et seq.)

If yes, attach a copy of the election and state date of election: _____

5. In the case of an intestacy, state the names of the decedent's surviving children or
surviving issue of deceased children (*if none, so state*):

6. Did the decedent marry after execution of Will or Codicil(s)? ☐ Yes ☐ No ☐ N/A

Were any children born to decedent after execution of
Will or Codicil(s)? ☐ Yes ☐ No ☐ N/A

If yes, give names and dates of birth:

Name:

Alice Johnson
Bob Smith
Charlie Brown
David Wilson
Emma Davis
Fiona White
George Hall
Hannah Lee
Isaac Martin
Jack Robinson

Date of Birth:

03/01/2024
03/02/2024
03/03/2024
03/04/2024
03/05/2024
03/06/2024
03/07/2024
03/08/2024
03/09/2024
03/10/2024

7. Was a request for a statement of claim, as required by the Medical
Assistance Estate Recovery Act, 62 P.S. § 1412, sent to the
Department of Human Services? ☐ Yes ☐ No ☐ N/A

PETITION FOR ADJUDICATION

Estate of **Sara Watt**, Deceased

8. 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 9 below, all unpaid creditors and all claimants listed in item 10 below. In addition, notice of any questions requiring adjudication as discussed in item 15 below has been or will be given to all persons affected thereby. If one of the beneficiaries is a trust or another estate and any of the accountants is also a fiduciary of the receiving trust or estate, provide written notice of the Account's filing to the beneficiaries of the trust or receiving estate, as applicable, if known.

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 person entitled to Notice is not sui juris (e.g., minors or incapacitated persons), Notice of the Audit has been or will be given to the appropriate representative on such party's behalf as required by Pa. O.C. Rule 4.2.

D. If any charitable interest is involved, Notice has been or will also be given to the Attorney General as required under Pa. O.C. Rule 4.4. In addition, the Attorney General's clearance certificate (or proof of service of Notice and a copy of such Notice) must be submitted herewith or at the Audit or filed before the date of the last day for filing objections in counties without separate Orphans' Court Divisions.

9. List all parties (charitable and non-charitable) of whom Petitioner(s) has/have notice or knowledge, having or claiming any interest in the estate as beneficiaries under the Will (if beneficiary is a trust, name the trust and trustee as the Interested Party) or Codicil(s) or as intestate heirs if there is a complete or partial intestacy.

This list shall:

A. State each party's relationship to the decedent 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 comSample comment testSample comment test2Sample comment test22ment test2 | 10 |

See continuation schedule attached

PETITION FOR ADJUDICATION

Estate of **Sara Watt**, Deceased

| Initials | Name and Address of Each Interested Party | Relationship and Comments, if any | Interest |
|----------|---|-----------------------------------|-----------|
| | 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 |

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).

Beneficiaries or Heirs
(continuation of Question #9A)

Estate of **Sara Watt**

, Deceased

| <i>Name and Address of Each Party in Interest</i> | <i>Relationship and Comments, if any</i> | <i>Interest</i> |
|---|--|-----------------|
| 5 Alexander James Henderson, Sr. Pine Street Suite 12A Seattle, WA 98101 | Grandson | 15 |
| 6 Sophia Marie Thompson, Jr. Lake Shore Drive Apt 21B Chicago, IL 60611 | Mother | 5 |
| 7 Sophia Grace Martinez, Jr. | Spouse | 20 |

PETITION FOR ADJUDICATION

Estate of **Sara Watt**, Deceased

- D. If distribution is to be made to the personal representative of a deceased party, state date of death, date and place of grant of Letters and type of Letters granted.

10. Other than the claim for the family exemption, list the names of all known claimants and the amount of their claims and state whether each claim is admitted.

| <i>Claimant Initials (if minor)</i> | <i>Name and Address of Each Claimant</i> | <i>Amount of Claim</i> | <i>Claim Admitted?</i> | <i>Will Claim Be Paid In Full?</i> |
|---|--|------------------------|----------------------------|--|
| T.J. | | 3,000.00 | No | No |
| L.W. | | 15,000.00 | Yes | Yes |
| R.B. | | 8,000.00 | Yes | No |
| A.S. | | 12,000.00 | No | No |
| Above | | 38,000.00 | | |
| Attachment | | 134,000.00 | | |
| Total | | 172,000.00 | | |

If the estate is insolvent, attach a schedule setting forth the order of preference under 20 Pa.C.S. § 3392 and the proposed payments.

Claims

(continuation of Question #10)

Estate of **Sara Watt**, Deceased

| <i>Claimant Initials (if minor)</i> | <i>Name and Address of Each Claimant</i> | <i>Amount of Claim</i> | <i>Claim Admitted?</i> | <i>Will Claim Be Paid in Full?</i> |
|---|--|------------------------|----------------------------|--|
| J.D. | | 5,000.00 | Yes | Yes |
| T.J. | | 3,000.00 | No | No |
| L.W. | | 15,000.00 | Yes | Yes |
| R.B. | | 8,000.00 | Yes | No |
| A.S. | | 12,000.00 | No | No |
| J.D. | | 5,000.00 | Yes | Yes |
| T.J. | | 3,000.00 | No | No |
| L.W. | | 15,000.00 | Yes | Yes |
| R.B. | | 8,000.00 | Yes | No |
| A.S. | | 12,000.00 | No | No |
| J.D. | | 5,000.00 | Yes | Yes |
| T.J. | | 3,000.00 | No | No |
| L.W. | | 15,000.00 | Yes | Yes |
| R.B. | | 8,000.00 | Yes | No |
| A.S. | | 12,000.00 | No | No |
| J.D. | | 5,000.00 | Yes | Yes |

PETITION FOR ADJUDICATION

Estate of **Sara Watt**, Deceased

11. Was family exemption claimed? ☒ Yes ☐ No

Was family exemption allowed? ☒ Yes ☐ No

Family exemption claimant's name and relationship:

Name: _____ Relationship: _____

12. The amount of Pennsylvania Transfer Inheritance Tax paid, the date(s) of payment(s), and the interest(s) upon which paid, are as follows:

| <i>Date</i> | <i>Payment</i> | <i>Interest</i> |
|-------------------|-----------------|-----------------|
| 01/15/2025 | 1,000.00 | 5 |
| 02/20/2025 | 1,500.00 | 4.5 |
| 03/10/2025 | 1,200.00 | 6 |
| 04/25/2025 | 2,000.00 | 5.2 |
| 05/30/2025 | 1,800.00 | 4.8 |
| 06/05/2025 | 2,200.00 | 5.5 |
| 07/12/2025 | 1,700.00 | 6.2 |
| 08/22/2025 | 2,500.00 | 4.9 |

13. On the date of death, was the decedent a fiduciary

(personal representative, trustee, guardian, agent under power

of attorney) or surety on the bond of a fiduciary? ☐ Yes ☐ No

If yes, provide the name of the estate, indicate whether an account has been filed and confirmed absolutely and all awards performed, or, in the alternative, how the decedent's estate will be discharged for the decedent's fiduciary administration of the estate.

PETITION FOR ADJUDICATION

Estate of **Sara Watt** _____, Deceased

14. On the date of death, was the decedent a party (as a plaintiff or defendant) in any litigation? ☒ Yes ☐ No

If yes, provide the caption of the litigation, docket number, where the matter is currently pending, and its status.

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

- B. Has notice of the question requiring adjudication been given to the parties identified in Paragraph 9 above? ☐ Yes ☐ No

16. If Petitioner(s) has/have knowledge that a share has been assigned, renounced, disclaimed or attached, provide a copy of the assignment, renunciation, disclaimer or attachment, together with any relevant supporting documentation.

PETITION FOR ADJUDICATION

Estate of **Sara Watt**, Deceased

17. Had the decedent been adjudicated an incapacitated person? ☐ Yes ☐ No

If yes, attach a copy of the Order if available; otherwise state the Court, docket number, date, and name of Hearing Judge.

18. A. List or attach a separate list of additional receipts and disbursements since the closing date of the Account.

| <i>Date</i> | <i>Description</i> | <i>Amount</i> |
|-------------------|-----------------------------------|-----------------|
| 01/10/2025 | Payment for invoice #123 | 1,000.00 |
| 02/15/2025 | Refund for order #456 | 1,500.00 |
| 03/20/2025 | Service charge for March | 1,200.00 |
| 04/25/2025 | Reimbursement for expenses | 2,000.00 |
| 05/30/2025 | Bonus payout | 1,800.00 |
| 06/05/2025 | Monthly subscription fee | 2,200.00 |
| 07/10/2025 | Annual maintenance charge | 1,700.00 |
| 08/15/2025 | Late fee adjustment | 2,500.00 |
| 09/20/2025 | Tax refund | 3,000.00 |

B. Has notice of the additional receipts and disbursements been given to the parties identified in Paragraph 9 above? ☐ Yes ☐ No

19. If a reserve is requested, state amount and purpose.

Amount: **10,000.00**

Purpose:

If a reserve is requested for counsel fees, has notice of the amount of fees to be paid from the reserve been given to the interested parties? ☐ Yes ☐ No

If so, attach a copy of the notice.

PETITION FOR ADJUDICATION

Estate of **Sara Watt**, Deceased

20. 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

As to real estate only? ☐ Yes ☐ No

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> |
|--------------------------------|---------------|-------------------|
|--------------------------------|---------------|-------------------|

See attached schedule

B. Principal:

| <i>Proposed Distributee(s)</i> | <i>Amount</i> | <i>Proportion</i> |
|--------------------------------|---------------|-------------------|
|--------------------------------|---------------|-------------------|

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

Proposed Distributions of Income
(continuation of Page 10)

Estate of **Sara Watt**, Deceased

| | | | |
|------------|--|---------------|-------------------|
| A. Income: | | | |
| | <i>Proposed Distributee(s)</i> | <i>Amount</i> | <i>Proportion</i> |
| 1 | Olivia Elizabeth Garcia, Jr. | | 25.0000 % |
| 2 | Isabella Natalie Rodriguez, Jr. | | 35.0000 % |
| 3 | Alexander James Henderson, Sr. | | 20.0000 % |
| 4 | Sophia Marie Thompson, Jr. | | 20.0000 % |

(Additional 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** _____, Deceased

(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.

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**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