



## 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 David James Clark, Jr., Michael Andrew Smith, Sr., Daniel Robert Harris, Sr  
., Emily Ann Wilson, Sr., Jessica Marie Brown, Jr., zetaConsulting, omicron  
Solutions, sigmaEnterprises, thetaCorporation, lambdaGroup, 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>
Telephone:	<u>(816) 555-4321</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: <b>Michael Andrew Smith, Sr.</b>	<b>David James Clark, Jr.</b>
Address: <b>Oak Street</b>	<b>Pine Street</b>
<b>Atlanta, GA 30305</b>	<b>San Francisco, CA 94102</b>

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

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

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:

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

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(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: **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** \_\_\_\_\_, 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 &amp; 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>
	<b>Christopher Daniel Lee, Sr. Broadway Avenue Suite 300 Los Angeles, CA 90001</b>	<b>Son Sample comment test1</b>	<b>10</b>
	<b>Olivia Elizabeth Garcia, Jr. Sunset Boulevard Penthouse 1A Phoenix, AZ 85003</b>	<b>Niece Sample comment test2</b>	<b>10</b>

**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>
	<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>
	<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, 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

**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 7)

Estate of **Sara Watt**

, Principal

A. Income:

*Proposed Distributee(s)*

*Amount      Proportion*

- 1 **Matthew Joseph White, Sr.**
- 2 **Isabella Natalie Rodriguez, Jr.**
- 3 **Sophia Marie Thompson, Jr.**
- 4 **Sophia Grace Martinez, Jr.**

Individual Fiduciary

**David James Clark, Jr.**

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

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

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** \_\_\_\_\_, 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

**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

**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  
**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.**