

# NOTICE OF CHARITABLE GIFT

(In Accordance with Pa. O.C. Rule 4.4)

COURT OF COMMON PLEAS OF

ORPHANS' COURT DIVISION

ESTATE OF \_\_\_\_\_, SETTLOR DECEASED  
No. \_\_\_\_\_

Chief, Charitable Trusts and Organizations Section  
Office of the Attorney General

Dear Sir or Madam:

Notice is given of a charitable gift as follows:

1. The nature of the present proceeding is an Account: Yes No If no, please proceed to Question 2.

(a) The Account is filed in a court with a separate Orphans' Court Division and has been or will be listed for Audit on \_\_\_\_\_,  
in \_\_\_\_\_.

*(State name of Courthouse and town/city.)*

The time and place of the Audit is Court Room \_\_\_\_\_ at \_\_\_\_\_ o'clock.  
If not provided herein, the time and location will be provided upon request when that information becomes available.

- (b) The Account is filed in a court without a separate Orphans' Court Division, and the last day for filing written objections is \_\_\_\_\_, at \_\_\_\_\_ o'clock.

Any objection shall be filed with \_\_\_\_\_  
on or before the date and time above. *(State name of Courthouse and town/city.)*

- (c) The Account concerns an estate or trust in which a charity has an interest or is a potential distributee. Yes No

If NO, the Account concerns an estate or trust in which all or part of the balance of assets remaining on hand will be distributed to:

an estate in which a charity has an interest; or

a trust in which a charity is named as a qualified beneficiary as defined in 20 Pa.C.S. § 7703.

\* If more space is required, attach additional sheets.

2. If the proceedings are other than an Account, state the nature of the proceedings and the place, date and time fixed for hearing:

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3. Charitable gifts are made as follows:

(a) Give full names and addresses of charities, and the names and addresses of counsel for any charity who has received notice or has appeared for it:

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(b) If pecuniary legacies, state exact amounts and indicate whether legacies will be or have been paid in full; if not, give reasons therefor.

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(c) If the charitable interest is a future interest and the estimated present value of the charity's future interest exceeds \$25,000, a brief description thereof including the conditions precedent to its vesting in enjoyment and possession, the names and ages of persons known to have interests preceding such charitable interest, and the approximate market value of the property involved.

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(d) If residuary gift, state nature and value of share.

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4. Provide a brief statement of all pertinent questions to be presented to the Court for adjudication or other disposition, including unresolved claims and any material questions of interpretation or distribution which may affect the value of the charitable interest.

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5. The names and addresses of the fiduciaries are (state whether Executors and/or Trustees):

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6. The names and addresses of counsel for the fiduciaries:

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Estate of \_\_\_\_\_,

SETTLOR      DECEASED

- 7. (a) A copy of the instrument creating the gift is attached hereto.
- (b) If the gift is other than a pecuniary legacy which will be paid in full, there is attached hereto:
  - (1) A copy of the Account, if one has been filed
  - (2) A copy of any other relevant documents

Very truly yours,

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name of Counsel

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

\_\_\_\_\_  
Name of Law Firm

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Email