

5.7

**PETITION FOR SETTLEMENT OF SMALL ESTATE
IN ACCORDANCE WITH 20 Pa. C.S.A. §3102**

[SEE CAPTION AT 1.3.1]

DECREE

Now, _____, 20____, upon consideration of the annexed Petition, the following property of the Estate of Joseph B. Dunn, Deceased, namely:

ABC Sanatorium - refund	\$ 9.80
Public School Employees' Retirement Board - annuity checks	467.80
Cash on deposit - Old Faithful Bank	7,276.85
Cash held by William Dunn from sale of books owned by Decedent	<u>135.02</u>
Total	\$ 7,889.47

is hereby ordered to be distributed and is hereby awarded as follows:

Jones & Jones - counsel fee	\$ 300.00
Local Hospital - debt of Decedent	105.30
John Goodheart, M.D. - debt of Decedent	63.44
Mrs. Sally Roe - debt of Decedent	200.00
William Dunn - reimbursement for payments on behalf of estate and distribution of entire balance of estate	<u>7,220.73</u>
Total	\$ 7,889.47

William Dunn is hereby authorized to receive, collect and distribute the property as hereinabove set forth, and to make any and all necessary assignments and transfers.

J.

[Petition on following page]

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IN ACCORDANCE WITH 20 Pa. C.S.A. §3102**

[SEE CAPTION AT 1.3.2]

PETITION

The Petition of William Dunn respectfully states that:

1. Joseph B. Dunn died on July 7, 2001, a patient at ABC Sanatorium, 123 Elm Street, Philadelphia, PA 19199.
2. Decedent was not married and was not survived by issue.
3. Decedent died intestate and no Letters of Administration have been issued.
4. The name of the only person having any interest as an heir or next of kin is William Dunn, of 100 Main Street, Philadelphia, PA 19199, the Petitioner herein, who is the son of a deceased brother, Henry Dunn, and who is of age and *sui juris*.
5. Petitioner was not a member of the Decedent's household at the time of his death.
6. The assets of Decedent total less than \$25,000 and are as follows:

a. ABC Sanatorium refund	\$ 9.80
b. Public School Employees' Retirement Board - annuity checks	467.80
c. Cash on deposit - Old Faithful Bank	7,276.85
d. Cash held by William Dunn from sale of books owned by Decedent	<u>135.02</u>
Total	\$7,889.47

7. The following creditors, who are all of the creditors of the estate of whom Petitioner has knowledge, are unpaid:

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a. Local Hospital - blood for transfusions	\$ 105.30
b. John Goodheart, M.D. - professional services	63.44
c. Mrs. Sally Roe - loan during illness	200.00
d. William Dunn - reimbursement for bill of Friendly Undertaker	<u>342.84</u>
Total	\$ 711.58

All of the above items are admitted.

8. A Pennsylvania Transfer Inheritance Tax Return has been filed with the Register of Wills, and inheritance tax has been paid in the amount of \$1,076 by Petitioner on April 7, 1996. The inheritance tax receipt is attached hereto as Exhibit "A."
9. Decedent was not a fiduciary of another estate and was not a surety on the bond of a fiduciary.
10. All of the above-named parties in interest have joined in this Petition, and their Joinders are set forth below.

Wherefore, Petitioner respectfully requests that this Court award Decedent's estate as follows:

1. Costs of administration
 - a. Jones & Jones - counsel fee in connection with the settlement of the estate \$300.00
 - b. William Dunn - cost of 3 certified copies of Decree 6.00
 - c. William Dunn - transportation to Philadelphia in connection with administration of estate - two trips 22.00 \$328.00

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2.	Costs of funeral and burial and medical care within six months of Decedent's death				
	a.	Local Hospital	\$105.30		
		b.	John Goodheart, M.D.	63.44	
		c.	William Dunn - reimbursement for payment to Friendly Undertaker	<u>324.84</u>	493.58
3.	Other debts				
		a.	Mrs. Sally Roe - loan during illness	200.00	
4.	Balance				
			William Dunn (including reimbursement for payment of inheritance tax in amount of \$1,076)		<u>\$6,867.89</u>
			Total		\$7,889.47

William Dunn

[SEE AFFIDAVIT AT 1.4.1 OR VERIFICATION AT 1.4.3]

Note: *Check 20 Pa. C.S.A. §3102 for possible changes in the size of estates for which this procedure is available. Also, refer to Philadelphia Rule 7.3, particularly subparagraph (b) thereof, for a list of exhibits to be attached to the petition. This procedure is used when no letters are granted. An alternative procedure (available one year after the first complete advertisement of the grant of letters) is governed by 20 Pa. C.S.A. §3531. Unlike §3102, this procedure covers real and personal property. The form of petition is similar in many respects with the following main differences:*

- 1. An averment covering the grant of letters;*
- 2. An averment that at least one year has passed since the first advertisement;*
- 3. An accounting and proposed distribution is to be attached as an exhibit; and*

The prayer of the petition will request the discharge of the personal representative.