

**COURT OF COMMON PLEAS OF PHILADELPHIA COUNTY  
ORPHANS' COURT DIVISION**

Estate of

Settlor

Deceased

No.                      of

**NOTICE OF CHARITABLE GIFT**

(In Accordance with O.C. Rule 5.5)

Charitable Trusts and Organizations Section  
Office of the Attorney General  
21 South 12th Street, Third Floor  
Philadelphia, PA 19107-3603

Date \_\_\_\_\_

Dear Sir:

Notice is given of charitable gift with respect to which report\* is made as follows:

1. The nature of the present proceedings is:
  - (a) An account which has been or will be listed for audit in the Orphans' Court Division on \_\_\_\_\_ in City Hall, Philadelphia. (Time and Courtroom need not be given.)
  - (b) If proceedings other than an Account, state nature of proceedings and the place, date and time fixed for hearing:
  
2. Charitable gifts are made as follows:
  - (a) Give full names and addresses of charities, and names and addresses of counsel, if any.
  
  - (b) If pecuniary legacies, state exact amounts and indicate whether legacies will be or have been paid in full; if not give reasons therefor.
  
  - (c) If gifts are in trust, state nature, terms and approximate amounts. If a future interest, state whether vested or contingent, and when it will come in to possession. If it is unlikely that the charitable gift will come into possession, explain why.

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

3. A brief statement of all pertinent questions to be submitted to the Court for Adjudication.
  
4. The names and addresses of the fiduciaries are (State whether executors and/or trustees):
  
  
  
  
  
  
  
  
  
5. (a) A copy of the instrument creating the gift is attached hereto.  
(b) If gift is other than 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
  - (3) A statement of all compensation which has been paid or is being claimed by the fiduciary and his counsel

Very truly yours,

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Signature

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Attorney for Fiduciary and I.D. No.

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Address

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Telephone Number

#### INSTRUCTIONS

The Pennsylvania Supreme Court has ruled in *Pruner Estate*, 390 Pa. 529, and *Garrison Estate*, 391 Pa. 234, that notice must be given to the Attorney General in all proceedings involving charitable trusts. This has been interpreted to apply to all charitable gifts, whether outright or in trust.

In the case of an account, this notice must be sent at least fifteen (15) days before the date fixed for audit or hearing. It need not be sent by Registered or Certified Mail. A copy of the notice must be submitted to the court at the audit or hearing.

If a Clearance Certificate is issued by the Attorney General's office, this should also be submitted to the court.

This notice and supporting documents should be forwarded to the office of the Attorney General in Philadelphia.