

RULE 13. DISTRIBUTION - SPECIAL SITUATIONS

13.1 REPRESENTATION BY COUNSEL

13.2 EXISTENCE AND IDENTITY

13.3 REPORT BY FIDUCIARY

Rule 13.3(1) Contents of Report.

The report required by Pa. O.C.R. 13.3 shall be submitted with the petition for distribution and shall include, substantially, the following:

(a) Unknown Distributee

If it appears that the identity or whereabouts of a distributee is unknown or there are no known heirs, a written report verified by affidavit of the Fiduciary or his counsel setting forth:

(1) the nature of the investigation made to locate the heirs of the decedent, in complete detail; and

(2) in cases of intestacy, a family tree, as complete as possible under the circumstances, supported by such documentary evidence as the Fiduciary has been able to obtain.

(3) copies of this material shall be forwarded to the Bureau of Escheats or to the Commonwealth as statutory heir.

(b) Non-Resident Distributee

If the Fiduciary requests the Court to withhold distribution to a non-resident distributee, a written report verified by affidavit of the Fiduciary or his counsel setting forth:

(1) the relationship of the distributee to the decedent and any available information concerning his present whereabouts;

(2) in cases of intestacy, a family tree, as complete as possible under the circumstances, supported by such documentary evidence as the Fiduciary has been able to obtain; and,

(3) the reasons for the request that distribution be withheld and the suggested manner of withholding.