

# Public Sale of a Decedent's Real Estate Checklist:

## Personal Representative

*Pursuant to local and state Orphans' Court rules*

Certificate of Compliance Form

AND/OR

Confidential Information Form

AND/OR

Confidential Document Form

Petition to set the amount or waive additional bond or security (PA OC Rules 7(C)(1), Local OC Rules 12.9)

Petition to sell the Real Estate (PA OC Rule 5.10, Local OC Rule 7(c)(1))

Order to waive bond (if waiver of bond is desired)

Preliminary Decree

Final Decree

Order for Hearing (Local OC Rule (7)(c))

Exhibits (Local OC Rule 5.10D)

- Copy of the will, deed or decree by which the fiduciary was appointed
- Any consents of joinders of interest parties and the names, and a copy of the notice which has been given to those parties
- Consent by any mortgagee whose lien would otherwise not be discharged by the sale
- Agreement of sale
- Full description of the subject real estate with recital of title
- Any additional documents crucial to the application for public sale

Signed Verification (Local OC Rule 7)

Citations for all interested parties

Certificate of Service

**\*\* Disclaimer \*\***

These checklists are for review of the Clerk of the Orphans' Court only, and do not constitute a full legal review of the filing. The Clerk of the Orphans' Court will not review filings for substantive compliance with statutes, court rules, court mandated forms, and other procedures. A full legal review will be conducted by the Senior Legal Review Officer. For checklists used by Court Administration, please go to <http://www.buckscounty.org/Courts/CourtAdministration> or call 215-348-3411. To ensure compliance with substantive law is adequate, the Clerk of the Orphans' Court recommends consulting with an attorney.

# Public Sale of a Decedent's Real Estate Checklist: Trustee/Guardian

*Pursuant to local and state Orphans' Court rules*

Certificate of Compliance Form

AND/OR

Confidential Information Form

AND/OR

Confidential Document Form

Petition (PA OC Rule 5.10, Local OC Rule 7(c)(1))

- Complete and with signature

Order for Hearing (Local OC Rule (7)(c))

Exhibits (Local OC Rule 5.10D)

- Copy of the will, deed or decree by which the fiduciary was appointed
- Any consents of joinders of interest parties and the names, and a copy of the notice which has been given to those parties
- Consent by any mortgagee whose lien would otherwise not be discharged by the sale
- Agreement of sale
- Full description of the subject real estate with recital of title
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Signed verification (Local OC Rule 7)

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