

STATE OF VERMONT

SUPERIOR COURT
Unit _____

PROBATE DIVISION
Case No. _____

In re ESTATE OF: _____

SUMMARY OF ACCOUNT

I am the fiduciary of the estate of the above-named decedent. I hereby account to the

Court for the period beginning _____ and ending _____

Date of Your Appointment as
Fiduciary or Date of Last
Accounting

End Date for This
Accounting Period

- This is an interim account.
- This is a final account.

ACCOUNTING WORKSHEET

Complete the Schedules in Worksheet A, B and C first. For each schedule (A1-A7, B1-B6 and C1-C2) that you enter an amount greater than 0, you MUST include an itemized accounting on a separate sheet of paper. Once you total the amount for each section, you must then record those totals on the Summary of Account on page 3. You must complete all sections top and bottom. If there is no value, please indicate with a zero.

SECTION A – ASSETS and RECEIPTS

Schedule		Value
A-1	Personal estate: (per inventory value or last account)	\$
A-2	Real estate: (per inventory value or last account)	\$
A-3	Gain on personal estate sold <i>(attach itemized list)</i>	\$
A-4	Gain on real estate sold <i>(attach itemized list)</i>	\$
A-5	Income to estate since inventory last account <i>(attach itemized list)</i>	\$
A-6	Personal and/or real estate not listed on inventory <i>(attach itemized list)</i>	\$
A-7	Monies advanced to estate <i>(attach itemized list)</i>	\$
	TOTAL ASSETS AND RECEIPTS Add all lines in Section A	\$

SECTION B – DISBURSEMENTS

You must complete all sections top and bottom. If there is no value, please indicate with a zero. List only disbursements since estate opened or last account.

Schedule B-1	Funeral and burial expenses <i>(attach itemized list)</i>	\$
B-2	Loss on personal estate sold <i>(attach itemized list)</i>	\$
B-3	Loss on real estate sold <i>(attach itemized list)</i>	\$
B-4	Paid debts <i>(attach itemized list)</i>	\$
B-5	Distribution(s) to Legatee(s) <i>(attach itemized list)</i>	\$
B-6	Support for surviving spouse or children <i>(attach itemized list)</i>	\$
B-7	Administrative expenses <i>(attach itemized list)</i>	\$
B-8	Attorney fees <i>(attach itemized statement)</i>	\$
B-9	Fiduciary fees <i>(attach itemized statement)</i>	\$
B-10	Other disbursements <i>(attach itemized list)</i>	\$
	TOTAL DISBURSEMENTS Add all lines in Section B	\$

SECTION C – BALANCE HELD BY FIDUCIARY

C-1	Personal Estate: Include values for cash in bank accounts, stocks, bonds, cars, etc. If real estate has been sold, include the net proceeds from the sale. <i>(Attach itemized list)</i>	\$
C-2	Real Estate: Include the value of any real property. If there is no real estate or if all real estate has been sold, enter zero. The proceeds from any real estate that has been sold should be entered online C-1. <i>(Attach itemized list)</i>	\$
	TOTAL BALANCE HELD BY FIDUCIARY Add line C-1 and C-2	\$

STATE OF VERMONT

SUPERIOR COURT
Unit

PROBATE DIVISION
Case No. _____

In re ESTATE of: _____

SUMMARY OF ACCOUNT

- Interim account checkbox
Final account checkbox

ACCOUNT SUMMARY (totals taken from accounting worksheet(s) Sections A through C)

- 1. TOTAL ASSETS and RECEIPTS from Section A \$
2. TOTAL DISBURSEMENTS from Section B \$
3. BALANCE HELD BY FIDUCIARY Subtract Line (2) from Line (1) \$
REAL ESTATE
Value of real estate not sold \$
PERSONAL ESTATE
Include value of all personal property including cash, stocks, bonds, cars, etc. \$

I/We declare that the above statements are true and accurate to the best of my knowledge and belief. I/We understand that if the above statements are false, I/We will be subject to the penalty of perjury or to other sanctions in the discretion of the court.

Date: _____

Signature of Fiduciary

Printed Name

Date: _____

Signature of Co-Fiduciary (if any)

Printed Name

STOP: Did you include an itemized list for each schedule where the value you recorded was greater than zero? The itemized lists must be attached to this form when you file it. At the top of each list, please indicate clearly the Section of the Form, the Schedule letter and number (e.g. A-1) and the type of asset, receipt or disbursement (e.g. Section B, Schedule B-3, Paid Debts).

STATE OF VERMONT

SUPERIOR COURT

PROBATE DIVISION

Unit

Case No. _____

In re ESTATE of:

Decedent

MOTION TO ALLOW ACCOUNT

I/We, _____, request that the Court allow the account for the estate as set forth in the attached Summary of Account. I have attached an itemized list for each schedule that has a value greater than zero.

Date: _____

Signature of Fiduciary

Printed Name

Date: _____

Signature of Co-Fiduciary (if any)

Printed Name

If this is a final accounting, please complete the following:

Affidavit of All Debts Paid

I/We, _____, Fiduciary(s) of the above-named estate, having been duly sworn, do hereby affirm that all of the debts, funeral charges, and expenses of administration of the deceased have been paid or will be paid by:

- All debts have been paid.
All debts will be paid according to an order issued by the court.

Please Select an option applicable to this case:

- Notice to Creditors was Published.
Notice to Creditors was Waived by Motion.

I/We declare that the above statements are true and accurate to the best of my knowledge and belief. I/We understand that if the above statements are false, I/We will be subject to the penalty of perjury or to other sanctions in the discretion of the court.

Date: _____

Signature of Fiduciary

Printed Name

Date: _____

Signature of Co-Fiduciary (if any)

Printed Name