

### **Rule 13.3A Contents of Report.**

The report contemplated by Pennsylvania Orphans' Court Rule 13.3 shall be submitted at the audit and shall include substantially the following:

#### 1. Unknown Distributee.

If it appears that the identity or whereabouts of a distributee is unknown, or there are no known heirs, the fiduciary shall submit a written report at the audit, as part of the Petition for Adjudication, verified by an affidavit of the fiduciary or his counsel, in which shall set forth:

a. the nature of the investigation made to locate the heirs of the decedent, in complete detail; and

b. in cases of intestacy, or where there are no known heirs, a family tree, as complete as possible under the circumstances supported by such documentary evidence as the fiduciary has been able to obtain.

The term "investigation" as used in this Rule shall include an inquiry of or to as many of the following as may be pertinent and feasible: residents of the household in which the decedent resided; friends and neighbors; labor union membership; places of employment; social, fraternal or beneficial organizations; insurance records; church membership; school records; Social Security, Veterans' Administration, or military service records; naturalization records, if not native born; and such other sources of information as the circumstances may suggest.

#### 2. Nonresident Distributee.

If the fiduciary requests the Court to withhold distribution to a nonresident distributee, he shall submit a written report at the audit, verified by the affidavit of the fiduciary or his counsel, in which shall be set forth:

a. the relationship of the distributee to the decedent, and any available information concerning his present whereabouts;

b. 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

c. the reasons for the request that distribution be withheld, and the suggested manner of withholding.

### 3. Nonresident Distributee. Notice to Attorney General.

When at the audit of an account or other proceeding in any estate in this Court, it appears that any distributee is a nonresident and that distribution to him might or should arguably be withheld for any lawful reason, notice of all of the facts and circumstances shall be given to the attorney general who will be requested to participate in the proceedings as amicus curiae.