

## **Rule 14.9A Allowances**

### **1. Petition Contents**

When approval of the court is necessary under 20 Pa.C.S.A. § 5536 for an allowance from an incapacitated person's estate, the petition shall set forth:

- a. the name of the guardian and the date of the appointment; if the petitioner is not the guardian, his or her relationship to the incapacitated person; and, if not related, the nature of his or her interest;
- b. a summary of the inventory or last report of the guardian, the date it was filed, and a summary of the nature and present value of the estate;
- c. the age, residence and the occupation, if any, of the incapacitated person;
- d. salary, income or benefits to which the incapacitated person is entitled or which the guardian or another person is receiving on behalf of the incapacitated person;
- e. the names and addresses of all interested persons and, which one of them, if any, are dependents of the incapacitated person;
- f. an itemized statement of all claims of the incapacitated person's creditors known to petitioner; and
- g. an itemized statement of the requested allowance and the reasons therefor; and a statement of all previous allowances, or that no previous allowances have been made by the court.

### **2. Exhibits**

- a. a copy of the decree appointing guardian;
- b. statements and/or invoices evidencing requested allowance(s) and any claim(s) against the estate; and
- c. a copy of the inventory or last report of the guardian.

### **3. Notice to Veterans' Administration**

If any portion of the incapacitated person's estate is or has been received from the United States Veterans' Administration, written notice of the requested allowance shall be given to said agency.

#### **4. Petition Practice**

In addition to providing an order for hearing, all requirements set forth in Chapter III of the Pennsylvania Orphans' Court Rules shall be applicable, including the submission of a verification by the petitioner, a certificate of service and a proposed final decree.