

AUDIT LIST

NOTICE
ORPHANS' COURT DIVISION
COURT OF COMMON PLEAS
OF MONTGOMERY COUNTY, PA.

VIRTUAL AUDIT

Notice of Filing and Audit of Accounts

Notice is hereby given to heirs, legatees, creditors, and all parties in interest that accounts in the following estates have been filed in the office of the Register of Wills or Clerk of the Orphans' Court Division of said County for audit in a Virtual Court Hearing during the week of February 7, 2022, in accordance with the Montgomery County Court of Common Pleas Virtual Court Hearing Protocol. Each Account is scheduled for one **Audit session, which will be held at 10:00AM on Monday, February 7, 2022.**

A list of Accounts scheduled to be called on each date is attached and invitations to Zoom Virtual Court hearings will be sent to the Counsel for each Accountant with an Account scheduled for each date.

To minimize the need for in-person contact with the Clerk of the Orphans' Court personnel and Court Staff, all counsel and parties are encouraged to file Accounts, Objections, Certificates of Service, and all other legal papers electronically with the Clerk to the fullest extent possible.

The accounts will be heard for confirmation at the assigned times when the Honorable Lois E. Murphy and the Honorable Melissa S. Sterling, Judges, will sit to audit accounts, hear objections to the same and review the transactions and proposed distribution of the balances ascertained to be in the hands of accountants. The date on which each account will be called for audit in a virtual court hearing is indicated below. Objections to any Account may be the subject of a hearing on a later date, to be scheduled by order of the Court.

NO FILINGS RELATED TO ANY MATTER ON THIS LIST WILL BE ACCEPTED BY THE OFFICE OF THE CLERK OF THE ORPHANS' COURT ON THE MORNING OF THE AUDIT AFTER 9:15 a.m. ON MONDAY, February 7, 2022. NOTE THAT ELECTRONIC FILINGS ARE BEING ACCEPTED. PAPER FILINGS MAY BE LEFT IN A DROP BOX AT THE COURTHOUSE ENTRANCE OR MAY BE MAILED TO THE OFFICE OF THE CLERK OF THE ORPHANS' COURT. NO COURT FILINGS WILL BE ACCEPTED BY THE CLERK AT THE COUNTER.

BUCKWALTER, JOSH, ALLEGED INCAPACITATED PERSON – January 5 – First and Interim Account of Special Needs Trust, Stated by PNC Bank National Association, Trustee.

GROSS, GWENDOLYN, PRINCIPAL – December 29 – First and Final Account, Stated by Anna Campbell as Agent of Gwendolyn Gross.

KILDAY, JEAN R., SETTLOR – January 5 – Second and Final Account, Stated by The Bryn Mawr Trust Company. T/U/A Dated March 6, 1975.

KOZLOWSKI, ERIK, ALLEGED INCAPACITATED PERSON – December 6 – First and Interim Account, Stated by PNC Bank, National Association and Robert J. Kozlowski, Trustees.

MCNAMARA, MARY JO, DECEASED, - Upper Dublin Twp – January 5 – First and Interim Account, Stated By Joseph D. McNamara, Executor filed pursuant to Order Dated 10/08/2021.

ROMANO, CAROLINA, DECEASED – Towamencin Twp – January 5 – First and Interim Account, Stated by Lawrence A. Romano, Executor.

ROMANO FAMILY TRUST, SETTLOR'S ESTATE – January 5 – First and Interim Account of Trust Dated 08/25/2000, Stated by Lawrence A. Romano, Successor Trustee.

SCHIMMEL, MARVIN F., DECEASED – January 5 – Lower Merion Twp – First and Interim Account, Stated by Harold M. Goldner, Executor.

SCHIMMEL, MARVIN F., Settlor – January 5– First and Interim Account, Stated by Harold M. Goldner and Roberta Baer - Schimmel, Co-Trustees.

THE ULRICH AND RUTH FRANK FOUNDATION FOR INTERNATIONAL HEALTH, NON-PROFIT CORPORATION – January 5 – Accounting for the Period 01/01/2015 – 10/01/2021, Stated by Miriam Chickering, 'Chief Office Executive.

ZIMMERMA, THOMAS, DECEASED – Lansdale – January 4 – First and Final Account, Stated by Anne Ziimmerma,exodd

Relisted Accounts

THE GARY S ASPLUNDH 2008 TRUST, SETTLOR – November 29 – First Intermediate Account, Stated by Rowland M. Smith, II and Travis J. Thompson, Co-Trustees.

TRUST OF CARL HJ ASPLUNDH JR FBO GARY S ASPLUNCH, SETTLOR - November 29 – First Intermediate Account, F/B/O Gary S. Asplundh, Stated by Rowland M. Smith, II Trustee. Deed of Trust Dated 12/20/1990.

GARY S ASPLUNDH TA 03/25/2002, SETTLOR – November 29 – First Intermediate Account, T/A Under Carl and Pamela Asplundh Issue Trust Agreement, Stated by Rowland M. Smith, III, Trustee. Trust Agreement Dated 03/25/2002.

D. Bruce Hanes, Esquire
Register of Wills &
Clerk of the Orphans' Court