

Please PRINT the completed Cover Sheet to file with the Clerk of the Orphans' Court

Instructions for Montgomery County Orphans' Court Cover Sheet

1A -- If this matter already has an Orphans' Court or Register of Wills file number, even if the party you represent has not filed any previous pleadings, check YES. If a Petition for Probate has been filed, even if this is the first filing in Orphans' Court, check YES. Otherwise check NO.

1B -- Enter the Orphans' Court or Register of Wills number, in the following format: YEAR-X####. For example, if the case was commenced in 2010 and received docket number 1234 the number will be 2010-X1234. All Orphans' Court cases (other than Adoption matters) have an "X" after the four-digit year and before the final four numbers. All Adoption matters have an "A" after the four-digit year.

2 -- Insert the name of the Estate. For example: "Estate of John Doe, Deceased" or "Trust under Deed of Jane Doe" or "Rose Roe, an Alleged Incapacitated Person". For a trust under will, please insert, for example, "Estate of John Doe, Deceased, Trust under Will for the benefit of grandchildren." The Estate or Entity is not necessarily the party you represent.

3 -- Check only one type of Estate or Entity to which this filing relates. Do not check "Miscellaneous" unless you have confirmed this selection with the Clerk of the Orphans' Court.

4 -- Insert the name of the party or parties on whose behalf this filing is made. (Your client, or if you have no attorney, yourself).

5 -- Describe the relationship between the party listed in 4 and the Estate or Entity. For example, the party may be a Beneficiary, Claimant, Guardian, Trustee, Objector or Executor, etc.

6A through 6E -- insert the name, name of firm, mailing address, telephone number, fax number, and e-mail address of the filing attorney. A self-represented party must insert the same information in boxes 6B through 6E, omitting box 6A.

7 and 8 -- The attorney must sign in box 8 and insert the date in box 7B, thereby entering the attorney's appearance. The attorney must also enter a Supreme Court I.D. Number in box 7A. A self-represented party must sign in box 8, date in box 7B, and thus enters his or her appearance in the case; a self-represented party should leave box 7A blank.

9 -- If this filing responds to a prior filing (by another party) please insert the date and title of the prior filing, as well as the "suffix" number assigned to the prior filing. The "suffix" can be found in a column labeled "suffix" on the docket for the case. The suffix also appears on the label affixed to any filed document as the numbers after the decimal following the Orphans' Court Case Number for any case.

10 -- Please attach a separate sheet listing all interested parties and their counsel and the address of each party's counsel. If a party is not represented, list the party's own mailing address.

11 -- Insert the type of filing you are filing from the attached list. A link to the list of filing types may also be viewed at: <http://rwoc.montcopa.org/forms>.

12 -- Choose one, and only one, of the options in Box 1 2A through 1 2E. For a petition that requests a citation and a return date -- select box 1 2A; for a petition that requests a rule and return date but no citation, select 12B; where a petitioner provides 20 days notice to other parties to object, select 12C; where all consents are attached and neither a return date nor 20 days notice is required, select 12D. For responsive filings, select 12E.