STATE OF VERMONT

SUPERIOR COURT **Unit**

PROBATE DIVISION
Docket 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 *(attach itemized list)*	$
A-4	Gain on real estate sold *(attach itemized list)*	$
A-5	Income to estate since inventory last account *(attach itemized list)*	$
A-6	Personal and/or real estate **not** listed on inventory *(attach itemized list)*	$
A-7	Monies advanced to estate *(attach itemized list)*	$
	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 *(attach itemized list)*	$
B-2	Loss on personal estate sold *(attach itemized list)*	$
B-3	Loss on real estate sold *(attach itemized list)*	$
B-4	Paid debts *(attach itemized list)*	$
B-5	Distribution(s) to Legatee(s) *(attach itemized list)*	$
B-6	Support for surviving spouse or children *(attach itemized list)*	$
B-7	Administrative expenses *(attach itemized list)*	$
B-8	Attorney fees *(attach itemized statement)*	$
B-9	Fiduciary fees *(attach itemized statement)*	$
B-10	Other disbursements *(attach itemized list)*	$
	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. *(attach itemized list)*	$
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 on line C-1. *(attach itemized list)*	$
	TOTAL BALANCE HELD BY FIDUCIARY ***Add line C-1 and C-2***	$

SECTION D –PROPOSED DISTRIBUTION For Final Accounting Only		
Name of Beneficiary	**Specific Description of Asset(s) To be Distributed to Beneficiary** e.g. If assets are in an account, include name of bank and account number; if assets consist of stocks, provide the name and the number of shares. Description should match the description in the Inventory.	**Value of Asset(s) to be Distributed**
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
		$
	TOTAL VALUE DISTRIBUTED	$

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Unit **Docket No.:**

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SUMMARY OF ACCOUNT

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

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. $ ______________

______________________ *Date*

______________________ *Signature of Fiduciary*

______________________ *Printed Name*

______________________ *Signature of Co-Fiduciary (if any)*

______________________ *Printed Name of Co-Fiduciary*

Subscribed and sworn before me on: ______________________
date

____
Signature of Notary

My commission expires on:

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).

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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.

	Signature of Fiduciary
____________________ *Dated*	*Fiduciary's Name Printed*
	Signature of Second Fiduciary if applicable
____________________ *Dated*	*Fiduciary's Name Printed*

Note: all fiduciaries must sign.