

\_\_\_\_\_ ACCOUNT

FILED BY: (PR) \_\_\_\_\_ Phone # \_\_\_\_\_

PERSONAL REPRESENTATIVE OF THE ESTATE OF:

\_\_\_\_\_

OF: \_\_\_\_\_ COUNTY

DATE OF DEATH: \_\_\_\_\_

DATE LETTERS WERE GRANTED: \_\_\_\_\_

ATTORNEY:  PROSE  \_\_\_\_\_

ADDRESS & PHONE #: \_\_\_\_\_



**TOTAL PROBATE ASSETS: \$** \_\_\_\_\_ ✓

(Figure must agree with total solely held personal property listed on LAST PAGE of Inventory)

- **Additional assets** received into the estate or **losses** occurring after filing of the Inventory:

- **Total Contributed Assets** ( if any ) :

Sub-Total: \$ \_\_\_\_\_

**Total Assets :** \_\_\_\_\_

Folio# \_\_\_\_\_

The Personal Representative(s) of the Estate of:

---

asks allowance for the following amounts:

ADMINISTRATIVE EXPENSES:

Subtotal \_\_\_\_\_

DEBTS OF THE ESTATE:

Subtotal \_\_\_\_\_

FUNERAL EXPENSES:

Subtotal \_\_\_\_\_

Attorney's fees: \_\_\_\_\_

Commissions allowed: \_\_\_\_\_

Total Expenses: \_\_\_\_\_

**Accounting Summary:**

+ Total Assets (From Page 1): \_\_\_\_\_

- Total Expenses (From above): \_\_\_\_\_

= Net Personal Estate(Total Assets – Total Expenses): \_\_\_\_\_

**Closing costs:**

1.75% (net personal x .0175): \_\_\_\_\_

0.25% (net personal x .0025): \_\_\_\_\_  
(Technology fee for date of death  
occurring on or after 7/1/2018 )

Recording and indexing: \_\_\_\_\_  
(If not prepaid at opening=\$20.)  
(Prepaid at opening = \$0.0)

Releases (See handout sample) : \_\_\_\_\_

Rule 190 (if attorney): \_\_\_\_\_

Late Fee(s): \_\_\_\_\_

**Total closing costs:** \_\_\_\_\_

**Total amount disbursed** (Total Expense + Total Closing Cost): \_\_\_\_\_

**Balance remaining in the Estate** (Total Assets – Disbursed): \_\_\_\_\_

*Is the filing of a Delaware Estate Tax Return necessary in this estate?* YES \_\_\_\_\_ NO \_\_\_\_\_

*If the answer is "yes", have you already filed with the Division of Revenue?* YES \_\_\_\_\_ NO \_\_\_\_\_

*If applicable, an "Affidavit That No Delaware Estate Tax Return is Required" must be filed with the Register of Wills, for persons dying between January 1, 1999 and December 31, 2004, **and** for persons dying between July 1, 2009 and December 31, 2017.*

*Is the filing of a Federal Estate Tax Return necessary?* YES \_\_\_\_\_ NO \_\_\_\_\_