

LEXISNEXIS® NEW YORK STATE BAR ASSOCIATION'S AUTOMATED SURROGATE'S FORMS

ATTORNEY AND COURT SETUP

Attorney Intake
Court Intake
Court Setup (Overlay Answer File)

CLIENT SETUP

Initial Client Setup for Probate
Initial Client Setup for Probate - Printable Summary
Initial Client Setup for Administration
Initial Client Setup for Administration c.t.a. After Probate
Estate Questionnaire -- Client Checklist

PROBATE FORMS

Probate Proceeding Checklist

Attorney Certifications

Attorney's Certification in Probate Proceeding
Attorney Certification Pursuant to Chief Judge Rule 130-1.1-(a) (Suffolk County)
Cover Page for Probate Proceeding

Petition for Probate (P-1)

Petition for Probate (P-1)
Petition for Probate (P-1) (Jefferson County)
Petition for Probate (P-1) (Kings County)

Combined Verification, Oath, Consent and/or Designations (for P-1)

Petition for Probate Signature Page

Individual Verification, Oath and Designation for Fiduciary Acting as Petitioner

Old Individual Combined Verification, Oath and Designation (for P-1)
New Individual Combined Verification, Oath and Designation (for P-1)
Old Individual Combined Verification, Oath and Designation (for P-1) (Albany County)
New Individual Combined Verification, Oath and Designation (for P-1) (Albany County)

Individual Oath and Designation for Fiduciary Not Acting as Petitioner

Old Individual Combined Oath and Designation for Executor/Trustee Not Acting As Pet.
(for P-1)

New Individual Combined Oath and Designation for Executor/Trustee Not Acting As
Pet. (for P-1)

Combined Oath and Designation (for P-1)

Consent, Oath and Designation of Trustee (for P-1)

Corporate Oath and Designation for Fiduciary Acting as Petitioner

Old Combined Corporate Verification, Consent and Designation (for P-1)

New Combined Corporate Verification, Consent and Designation (for P-1)

Affidavit of Comparison (P-13)

Attesting Witness (P-3, P-8, P-9)

Affidavit of Attesting Witness (P-3)

Dispensing with Witness

Application to Dispense with Testimony of Attesting Witness (P-8)

Affidavit Proving Handwriting (P-9)

Waiver of Process; Consent to Probate (P-4)

Waiver of Process; Consent to Probate (P-4)

Waiver of Process; Consent to Probate (P-4) (Onondaga County)

Waiver of Process; Consent to Probate; Lost Will (P-4) (Nassau County)

Model Cover Letters

Waiver Cover Letter to Probate Distributees

Waiver Cover Letter to Probate Distributees (Alternate)

Renunciation of Fiduciaries (P-10, P-11)

Renunciation of Nominated Executor and/or Trustee (P-10)

Renunciation of Letters of Administration c.t.a. and Waiver of Process (P-11)

Citation (P-5)

Probate Citation (P-5)

Probate Citation (P-5) (Chemung County)

Probate Citation (P-5) (Jefferson County)

Probate Citation (P-5) (Kings County)

Probate Citation (P-5) (Onondaga County)

Proof of Service (P-7)

Affidavit of Service of Citation (P-7)

Affidavit of Mailing of Citation

Alternative Service

Order for Alternate Service by Mail

Order for Service by Mail

Order for Publication (General Form)

Order for Service of Citation by Publication (Kings County)

SCPA 1411 Citation on Objections to Probate

Citation (Pursuant to SCPA 1411)

Citation upon Filing of Objections (Pursuant to SCPA 1411)

Notice of Probate (P-6)

Notice of Probate (P-6) (Jefferson County)

Affidavit of No Debt (P-12)

Preliminary Letters Testamentary (P-2)

Application for Preliminary Letters Testamentary (P-2)

Oath or Consent and Designation of Preliminary Executor (for P-2)

Oath and Designation of Trustee (for P-2)

Individual Oath and Designation

Old Individual Oath and Designation of Preliminary Executor (for P-2)

New Individual Oath and Designation of Preliminary Executor (for P-2)

Corporate Consent and Designation

Old Consent and Designation of Corporate Preliminary Executor (for P-2)

New Consent and Designation of Corporate Preliminary Executor (for P-2)

Decree Granting Probate

Decree Granting Probate

Decree Granting Probate (Bronx County)

Decree Granting Probate (New York County)

Decree Granting Probate (Queens County)

Decree Granting Probate (Westchester County)

Decree Granting Probate to Guardian ad Litem (Bronx County)

Decree of Probate (Nassau County)

Successor Letters Testamentary (P-14, P-15, P-16, P-17)

Petition for Successor Letters Testamentary (SLT-1/P-14)

Renunciation of Successor Letters Testamentary and Waiver of Process (Individual) (SLT-2/P-15)

Renunciation of Successor Letters Testamentary and Waiver of Process (Corporation) (SLT-3/P-16)

Notice of Petition for Appointment of Successor Executor (SLT-4/P-17)

Successor Letters Testamentary - Citation (SLT-5/P-17)

Miscellaneous Probate Forms**Kinship (FT-1)**

Affidavit of Heirship and Family Tree

Affidavit of Heirship (Kings County)

Family Tree (FT-1)

Family Tree Affidavit

Family Tree Affidavit (4th Judicial District)

Heirship Affidavit (4th Judicial District)

Lift Restrictions

Petition to Lift Restrictions (Queens County)

Order to Lift Restrictions (Queens County)

Notice of Application to Lift Restrictions (Queens County)

Affidavit of Mailing to Lift Restrictions (Queens County)

Petition to Lift Restrictions (Structured Settlement) (Queens County)

Order to Lift Restrictions (Structured Settlement) (Queens County)

Notice of Application to Lift Restrictions (Structured Settlement) (Queens County)

Affidavit of Mailing to Lift Restrictions (Structured Settlement) (Queens County)

Admission of Service (Broome County)

Affidavit for Service of Process (Broome County)

Affidavit for Service of Process (Cortland County)

Affidavit for Service of Process by Mail SCPA 307(2) (Broome County)

Affidavit for Service of Process by Mail SCPA 307(2) (Cortland County)

Affidavit of Attorney in Fact Pursuant to Rule 207.48(a)(2) (Broome County)

Affidavit of Attorney in Fact Pursuant to Rule 207.48(a)(2) (Cortland County)

Affidavit of Domicile

Affidavit of Domicile (Persons Residing in a Nursing Home) (Cortland County)

Affidavit of Fitness to Serve as Fiduciary

Affidavit of Property (Onondaga County)

Affidavit of Service of Probate Citation (Jefferson County)
Affidavit of Sole Heirship (Broome County)
Affidavit to Reopen Informally Closed Estates (Cortland County)
Affidavit Under Rule 207.17 of Uniform Rules (Otsego County)
Affirmation by Attorney (Informal Closing) (Cortland County)
Affirmation of Services (Guardian Ad Litem) (Broome County)
Certification 22 NYCRR 130-1.1(a) (Otsego County)
Certification Pursuant to 22 NYCRR §130-1.1-a(b) (Jefferson County)
Citation Objections to Probate (Kings County)
Citation Objections to Probate (Rensselaer County)
Citation to Show Cause (Original) (Rensselaer County)
Claim Against Estate/Affidavit Supporting Claim (Rensselaer County)
Consent to No Bond Regarding Life Use (Broome County)
Consent to Reduce Bond (Broome County)
Consent to Reduce Bond (Cortland County)
Decree for Appointment of Successor Executors (Queens County)
Decree for Appointment of Successor Trustee (Queens County)
Decree for Appointment of Trustee (Queens County)
Fiduciary Qualification Affidavit - Estates (Broome County)
Fiduciary Qualification Affidavit - Guardianship (Broome County)
Guardian Ad Litem Report (Broome County)
List of Interested Parties
Notice of Appearance (Broome County)
Notice of Appearance (Cortland County)
Notice Regarding Availability of Electronic Filing (Cortland County)
Order Extending Preliminary Letters Testamentary (Queens County)
Order for Publication and Service (Rensselaer County)
Order to Examine Residence (Queens County)
Petition by Attorneys to Have Fee Fixed
Petition for Appointment of Trustee(s) (Rensselaer County)
Petition for Issuance of Letters of Trusteeship
Petition for Issuance of Letters of Trusteeship (Orange County)
Petition to Compel Production of Will (Rensselaer County)
Petition to Examine Residence (Queens County)
Probate and Administration CTA Proceeding Checklist (Otsego County)
Probate Filing Checklist (Jefferson County)
Probate Proceeding Checklist (Otsego County)
Proof of Handwriting (Jefferson County)
Renunciation/Waiver and Consent to Probate (Jefferson County)
Request for a Transcript of a Proceeding (Cortland County)

Request for Access to Confidential Records (Cortland County)
Request for Preliminary Letters Testamentary (Jefferson County)
Staples Affidavit
Statement of Computation of Filing Fee SCPA 2402(1)(2) (Rensselaer County)
Suggestions for Conducting a Diligent Search (Broome County)
Supplemental Citation Request (Broome County)
Supplemental Needs Trust (SNT) Checklist (Otsego County)
Waiver and Consent to Probate (Jefferson County)
Waiver of Executor's Commissions
Waiver Recipients - Probate - Mailing List

ADMINISTRATION FORMS

Administration Proceeding Checklist
Attorney's Certification in Administration Proceeding
Cover Page for Administration Proceeding
Petition for Letters of Administration (A-1)

Additional Combined Verifications (for A-1)

Petition for Letters of Administration Signature Page

Individual Combined Verification, Oath and Designations

Old Individual Combined Verification, Oath and Designation (for A-1)
New Individual Combined Verification, Oath and Designation (for A-1)

Corporate Verification, Consent and Designations

Old Corporate Verification, Consent and Designation (for A-1)
New Corporate Verification, Consent and Designation (for A-1)
Administration Citation (A-2)
Administration Citation (A-2) (Jefferson County)
Notice of Application for Letters of Administration (A-3)
Affidavit of Mailing Notice of Application for Letters of Administration (A-4)
Notice to Consul General (A-5)
Decree Appointing Administrator (A-6)
Affidavit of Regularity (A-7)
Waiver of Citation, Renunciation and Consent to Appointment of Administrator (Individual) (A-8)
Waiver of Citation and Consent to Appointment of Administrator (Corporation) (A-9)
Affidavit of Service of Citation (Adult) (A-10)
Family Tree (FT-1)

Miscellaneous Administration Forms

Administration Proceeding Checklist (Otsego County)
Affidavit of Domicile (Persons Residing in a Nursing Home) (Cortland County)
Affidavit of Kinship and Family Tree
Affidavit of Party Renouncing Intestate Share
Affidavit of Service of Administration Citation (Jefferson County)
Affidavit to Reopen Informally Closed Estates (Cortland County)
Affidavit Under Rule 207.17 of Uniform Rules (Otsego County)
Application for Temporary Letters of Administration (Rensselaer County)
Assets and Debts (Broome County)
Assets and Debts (Cortland County)
Back for Administration Proceeding
Bond Affidavit for Letters of Administration
Consent to No Bond Regarding Life Use (Broome County)
Consent to Reduce Bond (Broome County)
Consent to Reduce Bond (Cortland County)
Consent to Reduced Bond
Decree Granting Letters of Administration (Bronx County)
Decree Granting Letters of Administration (Queens County)
Decree Granting Letters of Administration with Limited Authority
Decree Granting Letters of Administration with Limited Authority Due to Conflict of Interest
Decree Granting Limited Letters of Administration
Decree Granting Limited Letters of Administration (Queens County)
Family Tree Affidavit
Informal Closing Statement
Informal Closing Statement (Niagara County)
Informal Closing Statement (Niagara County) - Summary Account
List of Interested Parties
Notice Cover Letter to Probate Distributees
Notice of Renunciation of Intestate Share
Order for Publication
Release and Discharge of Administrator of Deceased
Renunciation of Intestate Share
Renunciation of Letters of Administration and Waiver of Process (Jefferson County)
Supplemental Citation Request (Broome County)
Waiver Cover Letter to Administration Distributees
Waiver Recipients - Administration - Mailing List

SMALL ESTATES FORMS

Voluntary Administration Checklist

Attorney's Certification in Settlement of Small Estate Under Article 13

Affidavit in Relation to Settlement of Estate Under Article 13, SCPA (SE-1A)

Amended Affidavit in Relation to Settlement of Estate Under Article 13, SCPA (SE-1B)

Renunciation of Voluntary Administration (SE-1C)

Report and Account in Settlement of Estate Pursuant to Article 13, SCPA (SE-1D)

Affidavit in Relation to Settlement of Estate Under Article 13, SCPA (SE-2A)

Amended Affidavit in Relation to Settlement of Estate Under Article 13, SCPA (SE-2B)

Affidavit in Relation to Settlement of Estate Under Article 13, SCPA (SE-3A)

Amended Affidavit in Relation to Settlement of Estate Under Article 13, SCPA (SE-3B)

Miscellaneous Small Estate Forms

Instructions for Article 13 Small Estate Affidavit (Rensselaer County)

Instructions for Filing Voluntary Administration Small Estate (Orange County)

Proceeding for Voluntary Administration Under Article 13 Designation of Clerk (New York County)

Small Estate Instructions (Jefferson County)

Voluntary Administration Checklist (Otsego County)

GUARDIAN, GUARDIAN AD LITEM, AND CUSTODIAN FORMS

Guardianship of Infant

Guardianship Proceeding Checklist Person Only

Guardianship Proceeding Checklist Person and/or Property

Attorney's Certification in Article 17 Guardianship Proceeding

Guardianship Citation (G-1)

Petition for Appointment of a Guardian (Infant Only) (G-2A)

Petition for Appointment of a Guardian (Person and Property/Property Only) (G-2B)

Affidavit of Proposed Guardian (G-3)

Affidavit of Parent (G-4)

Waiver, Renunciation, and Consent (G-5)

Decree Appointing Guardian (Joint Control) (G-6A)

Decree Appointing Guardian (Bond) (G-6B)

Annual Account of Guardian (Non-Bonded) (G-7A)

Annual Account of Guardian (Bonded) (G-7B)

Petition for Withdrawal of Infant's Property for Support and Education (G-8)

Order Permitting Withdrawal of Infant's Property for Support and Education (G-9)

Petition to Close Guardianship Account (Former Infant) (G-10A)

Petition to Close Guardianship Account (Guardian) (G-10B)

Release Settling Accounts (G-11)

Decree Closing Guardianship Account (Infant) (G-12A)
Decree Closing Guardianship Account (Guardian) (G-12B)

Standby Guardianship of Infant

Standby Guardianship Proceeding Checklist Person and/or Property
Attorney's Certification in Standby Guardianship Proceeding
Petition for Standby Guardianship (SG-1)
Physician's Opinion of Progressively Chronic or Fatal Illness (SG-2)
Waiver of Citation, Renunciation and Consent to Appointment of Standby Guardian (SG-3)
Citation (SG-4)
Affidavit and Consent of Proposed Standby Guardian Pursuant to SCPA 1726(3) (SG-5)
Consent of Petitioner for Standby Guardian (SG-6)
Consent of Infant Over 14 (SG-7)
Decree Appointing Standby Guardian (SG-8)
Confirmation Affidavit of Standby Guardian (SG-9)

Guardianship of Intellectually and Developmentally Disabled Person

17-A Guardianship Proceeding Checklist of Intellectually Disabled/Developmentally Disabled
Attorney's Certification in Article 17-A Guardianship Proceeding
Petition for Appointment of Guardian (SCPA Article 17-A) (GMD-1)
Affidavit of Proposed Guardian (GMD-1A)
Affidavit (Certification) of Examining Physician or Licensed Psychologist (GMD-2A)
Affirmation (Certification) of Examining Physician (GMD-2B)
Waiver of Process, Renunciation and Consent to Appointment of Guardian (GMD-3)
Consent, Oath and Designation (GMD-4)
Decree Appointing Guardian (GMD-5)
Decree Appointing Limited Guardian of Property (GMD-6)
17-A Guardianship Citation (GMD-7)
17-A Guardianship Citation (GMD-7) (Nassau County)
Notice of Petition Pursuant to SCPA 1753(2) (GMD-8)

Standby Guardianship of Intellectually and Developmentally Disabled Person

17-A Guardianship Proceeding Checklist Appointment/Confirmation of Standby Guardian
Attorney's Certification in Article 17-A Standby Guardianship Proceeding
Petition for Appointment/Confirmation of Standby Guardian (CSMD-1)
Waiver of Process Renunciation and Consent to Appointment of a Standby Guardian

(CSMD-2)

Notice of Petition (CSMD-3)

17-A Guardianship Citation (CSMD-4)

Affidavit of Proposed Guardian (CSMD-5)

Consent, Oath and Designation (CSMD-6)

Guardians ad Litem

Consent of Guardian ad Litem

Consent to Act as Guardian ad Litem

Order Appointing the Guardian ad Litem

Order Appointing Guardian ad Litem

Report and Recommendation of Guardian ad Litem

Custodians

Petition Requesting Appointment of Successor Custodian

Petition for Appointment of Successor Custodian (Orange County)

Consent to Petition for Successor Custodian (Orange County)

Joinder and Statement of Preference of Minor 14 Years and Over (Orange County)

Order Appointing a Successor Custodian (Orange County)

Miscellaneous Guardianship Forms

17A Guardianship Checklist (Otsego County)

17A Guardianship Instructions (Rensselaer County)

Back - Notice of Settlement Appointing Co-Guardians of the Person

Guardian Social Security (Broome County)

Guardianship Annual Account - Short Form (Broome County)

Guardianship Proceeding Checklist (Otsego County)

Order to Withdraw Funds to Pay Federal and State Income Taxes (Nassau County)

Petition for Leave to Withdraw Funds to Pay Federal and State Income Taxes (Nassau County)

Petition for Withdrawal of Funds (Rensselaer County)

Petition for Withdrawal of Guardianship Funds (Wyoming County)

Petition to Terminate a Guardianship Account (Broome County)

Waiver to Terminate a Guardianship Account (Broome County)

ACCOUNTING FORMS

Compulsory Accounting and Related Relief Proceeding Checklist

Informal Accounting with/without Decree Proceeding Checklist

Judicial Settlement of Account Proceeding Checklist

Petition for Judicial Settlement of Account (JA-1)

Receipt and Release (JA-2)
Waiver of Citation and Consent in Accounting (JA-3)
Trust Accounting with Instructions (JA-4)
Final/Intermediate Decree of Settlement for Executor with Interest/Trustee (JA-5)
Accounting Citation (JA-6)
Non-Trust Accounting with Instructions (JA-7)
Non-Trust Decree of Judicial Settlement (JA-8)
Compulsory Accounting Citation (JA-9)
Petition for a Compulsory Accounting and Related Relief (SCPA 2205) (JA-10)
Affidavit of Service (Infant Under 14 Years) (JA-11)
Inventory of Assets (I-1)
Firearms Inventory (I-2)

Miscellaneous Accounting Forms

Affidavit by Fiduciary
Affidavit by Fiduciary (Albany County)
Affidavit by Fiduciary (Erie County)
Affidavit by Fiduciary (Informal Closing) (Cortland County)
Affidavit by Fiduciary (Monroe County)
Affidavit by Fiduciary (7th Judicial District)
Affirmation by Attorney (7th Judicial District)
Affidavit of Attorney-Fiduciary (22 NYCRR § 207.52)
Affidavit Supplementing Account on Petition for Judicial Settlement of Account of Executor
Affirmation re: Fees for Legal Services
Approval of Account Release and Discharge of Representative SCPA 2203 (Broome County)
Cash Flow Statement (Queens County)
Consent to Advance Payment of Commissions
Objections to Accounting by Trustee
Order for a Compulsory Accounting
Order for Advance Payment of Commissions/Fees
Petition for Advance Payment of Commissions/Fees
Petition SCPA 2203 (Broome County)
Petition to Compel Accounting (Rensselaer County)
Proceeding for Judicial Settlement Checklist (Otsego County)
Receipt and Release (Cortland County)
Receipt, Release and Refunding Agreement
Release and Discharge of Representative (Broome County)
Release, Discharge and Approval of Accounts of Executor

Waiver to Settlement of Account SCPA 2203 (Surety) (Broome County)

ANCILLARY PROBATE FORMS

Ancillary Probate Proceeding Checklist

Attorney's Certification in Ancillary Probate Proceeding

Petition for Ancillary Probate (AP-1)

Additional Combined Verifications (for AP-1)

Individual Combined Verification, Oath and Designations

Old Individual Combined Verification, Oath and Designation (for AP-1)

New Individual Combined Verification, Oath and Designation (for AP-1)

Combined Corporate Verification, Consent and Designations

Old Combined Corporate Verification, Consent and Designation (for AP-1)

New Combined Corporate Verification, Consent and Designation (for AP-1)

Ancillary Probate Citation (AP-2)

Notice of Ancillary Probate (AP-3)

Miscellaneous Ancillary Probate Forms

Ancillary Proceeding Checklist (Otsego County)

Decree Granting Ancillary Letters Testamentary (Bronx County)

Decree Granting Ancillary Probate

Instructions for Filing Ancillary Probate or Administration Proceedings (Orange County)

Waiver and Consent for Ancillary Probate Proceeding

ANCILLARY ADMINISTRATION FORMS

Ancillary Administration Proceeding Checklist

Attorney's Certification in Ancillary Administration Proceeding

Petition for Ancillary Letters of Administration (AA-1)

Additional Combined Verifications (for AA-1)

Petition for Ancillary Letters of Administration Signature Page

Individual Combined Verification, Oath and Designations

New Individual Combined Verification, Oath and Designation (for AA-1)

Old Individual Combined Verification, Oath and Designation (for AA-1)

Combined Corporate Verification, Consent and Designations

Old Combined Corporate Verification, Consent and Designation (for AA-1)

New Combined Corporate Verification, Consent and Designation (for AA-1)
Ancillary Administration Citation (AA-2)
Notice of Application for Ancillary Letters of Administration (AA-3)

Miscellaneous Ancillary Administration Forms

Affidavit Concerning Deliverability of Process Served by Mail
Affidavit Concerning Deliverability of Process Served by Mail SCPA 307(2) (Broome County)
Ancillary Proceeding Checklist (Otsego County)
Decree Granting Ancillary Letters of Administration (Bronx County)
Decree Granting Ancillary Letters Testamentary
Instructions for Filing Ancillary Probate or Administration Proceedings (Orange County)

ADMINISTRATION C.T.A. AFTER PROBATE FORMS

Administration c.t.a. (after Probate) Proceeding Checklist
Attorney's Certification in Letters of Administration c.t.a. Proceeding
Petition for Letters of Administration c.t.a. After Probate (CTA-1)

Additional Combined Verifications (for CTA-1)

Petition for Letters of Administration c.t.a. Signature Page

Individual Combined Verification, Oath and Designations

Old Individual Combined Verification, Oath and Designation (for CTA-1)
New Individual Combined Verification, Oath and Designation (for CTA-1)

Corporate Verification, Consent and Designations

Old Corporate Verification, Consent and Designation (for CTA-1)
New Corporate Verification, Consent and Designation (for CTA-1)
Citation (CTA-2)
Renunciation of Letters of Administration c.t.a. and Waiver of Process (CTA-3)
Affidavit of No Debt (P-12)

Miscellaneous Administration c.t.a. After Probate Forms

Decree for Appointment of Successor Administrators CTA (Queens County)
Decree Granting Letters of Administration c.t.a.
Probate and Administration CTA Proceeding Checklist (Otsego County)

ADMINISTRATION D.B.N. FORMS

Administration d.b.n. Proceeding Checklist
Attorney's Certification in Administration d.b.n. Proceeding

Petition for Letters of Administration d.b.n. (ADM/DBN-1)

Additional Combined Verifications (for ADM/DBN-1)

Individual Combined Verification, Oath and Designations

Old Individual Combined Verification, Oath and Designation (for ADM/DBN-1)

New Individual Combined Verification, Oath and Designation (for ADM/DBN-1)

Combined Corporate Verification, Consent and Designations

Old Combined Corporate Verification, Consent and Designation (for ADM/DBN-1)

New Combined Corporate Verification, Consent and Designation (for ADM/DBN-1)

Administration d.b.n. Citation (ADM/DBN-2)

Waiver, Renunciation and Consent to Administration d.b.n. (ADM/DBN-3)

Consent to Appointment of Administrator d.b.n. (Corp.) (ADM/DBN-4)

Notice of Application for Letters of Administration d.b.n. (ADM/DBN-5)

Affidavit of Mailing Notice of Application for Letters of Administration d.b.n.
(ADM/DBN-6)

Notice to the Consul General (ADM/DBN-7)

Affidavit of Service of Citation (Adult) (ADM/DBN-8)

Miscellaneous Administration d.b.n. Forms

Decree for Appointment of Successor Administrators DBN (Queens County)

Decree of Administration d.b.n.

SUCCESSOR LETTERS TESTAMENTARY FORMS

Petition for Successor Letters Testamentary (SLT-1/P-14)

Renunciation of Successor Letters Testamentary and Waiver of Process (Individual) (SLT-2/P-15)

Renunciation of Successor Letters Testamentary and Waiver of Process (Corporation)
(SLT-3/P-16)

Notice of Petition for Appointment of Successor Executor (SLT-4/P-17)

Successor Letters Testamentary - Citation (SLT-5/P-17)

WRONGFUL DEATH FORMS

Wrongful Death Compromise Settlement Proceeding Checklist

Wrongful Death Citation (WD-1)

Wrongful Death Petition (WD-2)

Account (WD-3)

Attorney's Affidavit (WD-4)

Waiver and Consent for Insurance Company (WD-5)
Waiver and Consent for Individual (WD-6)
Decree (WD-7)

Miscellaneous Wrongful Death Forms

Compromise and Account Checklist (Queens County)
Compromise Checklist (Queens County)

ADOPTION FORMS

Agency Adoption Proceeding Checklist
Private Placement Adoption Proceeding Checklist
Petition for Adoption (Agency) (1-A)
Verified Schedule (Agency) (1-B)
Petition for Adoption (Private Placement) (1-C)
Affidavit (Change of Circumstance Since Certification) (Private Placement) (1-Ca)
Child's Medical History (Adoption) (1-D)
Affirmation Regarding Venue (1-E)
Determination of Family Court Judge Regarding Venue (1-F)
Order Regarding Venue (1-G)
Agreement of Adoption and Consent (Agency) (2-A)
Agreement of Adoption (Private-Placement) (2-B)
Consent of Child Over 14 (Agency) (2-C)
Consent of Child Over 14 (Private Placement) (2-D)
Affidavit and Consent of Custodian (Other Than Birth or Legal Parent--Private Placement) (2-E)
Judicial Consent (Birth or Legal Parent--Private Placement) (2-F)
Judicial Consent of Birth or Legal Parent to Adoption by Step-Parent (2-Fa)
Extrajudicial Consent (Birth or Legal Parent--Private Placement) (2-G)
Extrajudicial Consent (Birth or Legal Parent--Private Placement Step-Parent) (2-Ga)
Order Directing Service of Notice (3)
Notice of Proposed Adoption (4)
Order of Publication (Agency) (5)
Order for Investigation (6)
Report of Investigation (Private Placement) (7)
Affidavit Identifying Party (Agency) (8-A)
Affidavit Identifying Party (8-B)
Affidavit of Financial Disclosure - Parents (Agency) (9-A)
Affidavit of Financial Disclosure - Parents (Private-Placement) (9-B)
Supplemental Affidavit (Agency) (10-A)
Supplemental Affidavit (Private-Placement) (10-B)

Affidavit Regarding Status of Appeal (10-C)
Order to Show Cause (Removal of Child from Adoptive Home) (11)
Order Removing Child from Adoptive Home (12)
Order of Adoption (Agency) (13-A)
Order of Adoption (Private-Placement) (13-B)
Certificate of Adoption (14)
Order of Incorporation of Post-Adoption Contact Agreement (Agency Adoption) (14-A)
Application for Certified Copy of Adoption Order (Before Sealing of Records) (15-A)
Order for Certified Copy of Adoption Order (Before Sealing of Records) (15-B)
Application for Certified Copy of Adoption Order (After Sealing of Records) (16-A)
Order for Certified Copy of Adoption Order (After Sealing of Records) (16-B)
Petition for Enforcement of Post-Adoption Contact Agreement (After Adoption Finalization) (17)
Order Determining Petition for Enforcement of Post-adoption Contact Agreement (18)
Petition for Temporary Guardianship (21-A)
Order for Temporary Guardianship (21-B)
Notice of Petition for Temporary Guardianship (21-C)
Notice of Denial of Withdrawal of Application for Removal of Child (21-D)
Affidavit of Change of Circumstance since Certification as Qualified Adoptive Parent (21-E)
Petition (Certification as a Qualified Adoptive Parent) (Private-Placement) (22)
Affidavit and Report of Disinterested Person Regarding Cert. as Qualified Adoptive Parent (23)
Order (Certification as a Qualified Adoptive Parent) (24)
Order for Conditional Certification as Qualified Adoptive Parent (25)
Petition for Extension of Expired Certification (Private Placement Adoption) (26)
Affidavit and Report (Disinterested Person - Extension of Expired Certification) (26-A)
Petition for Access to Sealed Adoption Records (27-A)
Notice of Petition for Access to Sealed Adoption Records (27-B)
Affidavit of Service of Petition for Access to Sealed Adoption Records (27-C)
Waiver of Notice of Petition for Access to Sealed Adoption Records (27-D)
Order on Petition for Access to Sealed Adoption Records (27-E)
Petition for Registration of Foreign Adoption Order (28)
Order of Foreign Adoption and Name Change) (28-A)
Petition for Adult Adoption (29-A)
Consent to Adult Adoption by Adoptee (29-B)
Consent to Adult Adoption by Spouse (29-C)
Report of Adoption (DOH-1928)
Adoption Information Registry Birth Parent Registration Form (DOH-4455)
Order for Child Protective Inquiry

NYS OCFS Request/Response for Name of Father of Child Born Out of Wedlock (LDSS-2725)

NYS Unified Court System Attorney's Affidavit (Agency and Private Placement Adoptions) (UCS-836)

New York State Office of Children and Family Services Forms

Request for Information Guardianship (OCFS-3909)

Request for Information Regarding Private Adoption (OCFS-3937)

Order of Adoption Family Court/Surrogate Court Request Form (OCFS-4156)

Miscellaneous Adoption Forms

Adoption and Adoption Pre-Certification Confidential Affidavit (Otsego County)

Agency Adoption Checklist (Otsego County)

Pre-Adoption Certification Checklist (Otsego County)

TAX FORMS

Internal Revenue Service Forms

Notice Concerning Fiduciary Relationship (56)

United States Estate (and Generation-Skipping Transfer) Tax Return (706)

United States Additional Estate Tax Return (706-A)

Certificate of Payment of Foreign Death Tax (706-CE)

Generation-Skipping Transfer Tax Return for Distributions (706-GS(D))

Notification of Distribution from a Generation-Skipping Trust (706-GS(D-1))

Generation-Skipping Transfer Tax Return for Terminations (706-GS(T))

United States Estate (and Generation-Skipping Transfer) Tax Return (706-NA)

United States Estate Tax Returns for Qualified Domestic Trusts (706-QDT)

United States Gift (and Generation-Skipping Transfer) Tax Return (709)

Life Insurance Statement (712)

United States Income Tax Return for Estates and Trusts (1041)

United States Information Return Trust Accumulation of Charitable Amounts (1041-A)

Capital Gains and Losses (1041 Schedule D)

Estimated Income Tax for Estates and Trusts (1041-ES)

Alternative Minimum Tax - Estates and Trusts (ATM) (1041 Schedule I)

Accumulation Distribution for Certain Complex Trusts (1041 Schedule J)

Beneficiary's Share of Income, Deductions, Credits, etc. (1041 Schedule K-1)

United States Income Tax Return for Qualified Funeral Trusts (1041-QFT)

Allocation of Estimated Tax Payments to Beneficiaries (1041-T)

Payment Voucher (1041-V)

Power of Attorney and Declaration of Representative (2848)

Declarations - Executor's Commissioner's and Attorney's Fees (4421)
Application for Certificate Discharging Property Subject to Estate Tax Lien (4422)
Request for Copy of Tax Return (4506)
Request for Transcript of Tax Return (4506-T)
Application for Extension of Time to File a Return and/or Pay U.S. Estate Taxes (4768)
Application for Automatic Extension of Time to File Certain Business Income Tax Returns (7004)
Release/Revocation of Release of Claim to Exemption for Child by Custodial Parent (8332)
Tax Information Authorization (8821)
Entity Classification Election (8832)
Sales and Other Dispositions of Capital Assets (8949)
Information Regarding Beneficiaries Acquiring Property from a Decedent (8971)
Application for Employer Identification Number (SS-4)
Application for IRS Individual Taxpayer Identification Number (W-7)
Application for Taxpayer Identification Number for Pending U.S. Adoptions (W-7A)
Solicitud de Número de Identificación (W-7(SP))
Request for Taxpayer Identification Number and Certification (W-9)
IRS Paid Preparer Tax Identification Number (PTIN) Application and Renewal (W-12)

New York State Department of Taxation and Finance Forms

NYS Tax Department Waiver Request Instructions (AU-67)
Estate Tax Power of Attorney (ET-14)
Stipulation Reserving Domicile (ET-20)
Application for Estate Tax Waivers/Releases of Estate Tax Lien (ET-30)
New York State Estate Tax Certification (ET-85)
New York State Estate Tax Return (ET-90)
Claim for Refund of New York State Estate Tax (ET-95)
Estate Tax Waiver Notice (ET-99)
Release of Lien of Estate Tax (ET-117)
Tentative Payment of Estate Tax (ET-130)
Application for Extension of Time to File and/or Pay Estate Tax (ET-133)
New York State Estate Tax Domicile Affidavit (ET-141)
Computation of Credit for Estate Tax on Prior Transfers (ET-190)
Computation of Estate Tax Credit for Agricultural Exemption (ET-411)
Application for Deferred Payment of Estate Tax (ET-415)
New York State Estate Tax Return (ET-706)
Authorization for Release of Photocopies of Tax Returns and/or Tax Information (DTF-505)
Fiduciary Income Tax Return (IT-205)

Fiduciary Allocation (IT-205-A)
New York State Resident Trust Nontaxable Certification (IT-205-C)
New York State Accumulation Distribution for Exempt Resident Trusts (IT-205-J)
Allocation of Estimated Tax Payments to Beneficiaries (IT-205-T)
Payment Voucher for Fiduciary Income Tax Returns (IT-205-V)
Power of Attorney (POA-1)
Bill of Costs--Taxation of Costs (SCPA)
Bill of Costs--Taxation of Costs (CPLR)

NEW YORK STATE OFFICE OF COURT ADMINISTRATION FORMS

Statement of Approval of Compensation (UCS-875)
Report of Compensation Received by Law Firms for Appointments Pursuant to Part 36 (UCS-876)

PRIVATELY PAID LAW GUARDIANS

Order Appointing Law Guardian (UCS-880)
Affirmation of Services for Privately Paid Law Guardians (UCS-881)
Order Approving Law Guardian Compensation (UCS-882)

NEW YORK STATE BAR ASSOCIATION MODEL FORMS

Compel Production of Will

Order to Compel Production of Will
Petition to Compel Production of Will

Contempt

Order to Show Cause for Contempt of Court
Petition for Enforcement of Order Pursuant to SCPA § 606

Discharge of Legal Representative

Decree Discharging Legal Representative
Petition for Discharge of Legal Representative

Disclaimer

Affidavit in Support of Renunciation and Disclaimer
Affirmation/Affidavit of Service
Renunciation and Disclaimer of Interests in Estate

Examine Tax Return

Order to Examine Tax Return

Petition to Examine Tax Return

Extension of Preliminary Letters Testamentary

Application for Extension of Preliminary Letters Testamentary - Schedule

Application for Extension of Preliminary Letters Testamentary (Nassau County)

Order Extending Preliminary Letters Testamentary

Order Extending Preliminary Letters Testamentary (Nassau County)

Order for Preliminary Letters Testamentary

Judicial Settlement

Affidavit of Compliance with Judicial Settlement Decree

Affirmation of Compliance with Decree and Request for Order and Discharge

Order for a Compulsory Accounting

Order for Judicial Settlement

Open Safe Deposit Box

Order to Examine Safe Deposit Box (Orange County)

Order to Examine Safe Deposit Box (SD BOX-2)

Order to Open Safe Deposit Box

Order to Open Safe Deposit Box (Queens County)

Petition to Examine Safe Deposit Box (Orange County)

Petition to Open Safe Deposit Box

Petition to Search Safe Deposit Box (SD BOX-1)

Search Premises

Order to Search Premises

Petition to Search Premises

Service of Process

Affidavit of Service of Citation by Mail

Affirmation and Application for Substituted Service

Application and Affidavit for Service of Process by Publication

Order for Substituted Service

Order of Service

Petition for Substituted Service of Citation

Successor Executor/Administrator

Order Appointing Successor Executor/Administrator

Petition for Successor Letters Testamentary/Letters of Administration

Waiver and Consent to Petition for Successor Letters Testamentary/Administration

Waiver

Waiver Cover Letter to Probate Distributees
Waiver Cover Letter to Probate Distributees (Alternate)
Waiver Recipients - Probate - Mailing List
Waiver Cover Letter to Administration Distributees
Waiver Recipients - Administration - Mailing List

Miscellaneous Forms

Acknowledgment by a Person Within/Outside New York State (RPL § 309-a)
Acknowledgment by a Person Within/Outside New York State (RPL § 309-a) (Graphical)
Acknowledgment of Disclosure (Attorney-Executor)
Affidavit to Dispense with Filing of a Bond
Affidavit to Dispense with Filing of a Bond (New York County)
Attorney-Fiduciary Checklist
Authorization of Appearance
Back
Consent to Change Attorney
Decree for Preliminary Letters Testamentary
Decree Granting Probate
Kinship Affidavit
Notice of Appearance
Notice of Election by Surviving Spouse
Order for Publication
Petition for Preliminary Letters Testamentary
Petition to Turn Over Property Withheld and Belonging to Decedent (SCPA 2103)
Proof of Will
Report of Estate Not Fully Distributed (22 NYCRR 207.42)
Report Pursuant to 22 NYCRR 207.42
Statement Pursuant to 22 NYCRR 207.16(e)
Verified Claim
Verified Claim (Graphical)

POWER OF ATTORNEY

Power of Attorney (New York Statutory Short Form)

HEALTH CARE PROXY

Health Care Proxy (DOH-1430)

NYS COURTS ELECTRONIC FILING (NYSCEF) FORMS

E-Filing Forms

Notice Regarding Availability of Electronic Filing (SC-1)
Request for Surrogate's Court Action (SC-2)
Notice of Intent to Cease E-Filing (SC-3)
Notice Regarding Sealing of Document in E-Filed Proceeding (SC-4)
Statement of Authorization for Electronic Filing - Single Attorney (Individual) (SC-5)
Statement of Authorization for Electronic Filing - Single Attorney (Entity) (SC-6)
Statement of Authorization for Electronic Filing - Managing Attorney (Individual) (SC-7)
Statement of Authorization for Electronic Filing - Managing Attorney (Entity) (SC-8)
Revocation of Authorization for Electronic Filing - Single Attorney (SC-9)
Revocation of Authorization for Electronic Filing - Managing Attorney (SC-10)
Notice of Hard Copy Submission - E-Filed Proceeding (SC-11)
Notice of Hard Copy Exhibit Filing (SC-12)

Mandatory E-Filing Forms

Notice of Commencement of Proceeding Subject to Mandatory Electronic Filing (SCM-1)
Notice of Opt-Out from Participation in Proceeding Subject to Electronic Filing (SCM-2)
Notice of Hard Copy Submission - E-Filed Proceeding (SCM-3)
Notice of Hard Copy Exhibit Filing (SCM-4)
Notice of Intent to Cease E-Filing (SCM-5)