

Ancillary Probate in Pennsylvania

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A Practice Note summarizing the procedure for ancillary probate in Pennsylvania. This Note identifies the key laws and procedures for an ancillary estate proceeding in Pennsylvania, such as preliminary requirements for beginning an ancillary proceeding, the appointment of an ancillary fiduciary, the petition for ancillary probate or ancillary administration, and the administration and distribution of an ancillary estate.

If a non-domiciliary individual dies owning property in Pennsylvania that does not pass by title or operation of law, the estate fiduciary in the state where the decedent lived (the decedent's domicile) may be required to open an additional estate proceeding in Pennsylvania, called an ancillary proceeding.

An ancillary proceeding in Pennsylvania is secondary to a primary estate proceeding commenced in the decedent's state of domicile. A Pennsylvania ancillary proceeding results in the Register of Wills for the proper Pennsylvania county appointing a fiduciary in Pennsylvania to administer the Pennsylvania assets. A foreign fiduciary may also be able to exercise powers in Pennsylvania without a formal ancillary probate proceeding.

The estate fiduciary or the decedent's family typically hires a Pennsylvania lawyer to assist with the ancillary proceeding. Pennsylvania law controls ancillary proceedings in Pennsylvania, which can be complicated for an out-of-state attorney. This Note provides an overview of the ancillary proceeding process in Pennsylvania.

TYPES OF ESTATE PROCEEDINGS

In Pennsylvania, the three main categories of estate proceedings are:

- Testate or intestate administration for Pennsylvania decedents.
- Settlement of small estates by petition for Pennsylvania decedents.

- Proceedings in Pennsylvania by foreign fiduciaries (that is, ancillary proceedings) for non-Pennsylvania decedents.

This Note addresses ancillary proceedings. Ancillary proceedings are the legal processes used when a non-Pennsylvania domiciliary dies owning certain property in Pennsylvania. In an ancillary probate proceeding, the Register of Wills appoints a Pennsylvania personal representative to:

- Collect the decedent's Pennsylvania situs property.
- Pay the decedent's debts and estate expenses (see Payment of Expenses and Claims).
- Distribute the remaining property to creditors or the appropriate individuals or fiduciaries in the decedent's home state (see Distribution of Assets).

Pennsylvania has no technical name for ancillary proceedings. If the decedent died:

- With a will, there are two statutory methods for an ancillary proceeding (see Administration in Decedent's Domicile Required).
- Without a will, there is only one statutory method available for an ancillary proceeding (see Powers of Foreign Fiduciaries: PEF Code 4101).

For a detailed explanation of the other types of estate proceedings in Pennsylvania, see Practice Note: Understanding Probate in Pennsylvania ([w-000-3710](#)) and State Q&A, Probate: Pennsylvania ([w-013-5302](#)).

In Pennsylvania, the fiduciary who is responsible for administering a decedent's estate is known as a personal representative. If the personal representative is named in the will, he may be referred to as the executor. If the personal representative is not named in the will, he may also be referred to as the administrator.

JURISDICTION OVER ESTATE PROCEEDINGS

In Pennsylvania, the Register of Wills of each county (referred to in Allegheny County as the Director of Court Records, Orphans' Court Division) acts as a quasi-judicial body and has original jurisdiction over the grant or denial of letters testamentary or letters of administration (20 Pa. C.S.A. § 901).

The Orphans' Court divisions of the Courts of Common Pleas in Pennsylvania have jurisdiction over estate proceedings (20 Pa. C.S.A. § 711, 712), including appeals from actions of the Register (20 Pa. C.S.A. § 711(18)).

The Orphans' Court has mandatory jurisdiction over, among other matters:

- The administration of *inter vivos* trusts (20 Pa. C.S.A. § 711(3)).
- All foreign and domestic fiduciaries acting in Pennsylvania (20 Pa. C.S.A. § 711(12)).
- Determination of title to personal property (20 Pa. C.S.A. § 711(17)).
- The actions of agents under power of attorney (20 Pa. C.S.A. § 711(22)).

The Orphans' Court has non-mandatory jurisdiction over:

- The determination of title to real estate that has passed by devise or descent or by the terms of the trust instrument where jurisdiction of the estate or trust is exercised through the Orphans' Court division.
- The control and removal of the guardian of the person of any incapacitated person.
- The disposition of any case where there are substantial questions concerning matters over which the Orphans' Court has mandatory jurisdiction.

(20 Pa. C.S.A. § 712.)

Although the term domicile is not defined in the Probate Estates and Fiduciaries (PEF) Code, as used in PEF Code 3131 it is the same as domicile (see *In re Loudenslager's Estate*, 240 A.2d 477 (Pa. 1968)).

RULES APPLICABLE TO ESTATE PROCEEDINGS

The PEF Code (20 Pa. C.S.A §§ 101 to 8815) sets out:

- The laws and procedures for grant of letters (20 Pa. C.S.A. §§ 3101 to 3184).
- The laws governing administration of estates (20 Pa. C.S.A. §§ 3301 to 3393).
- The laws of intestacy, which define parties that will inherit in the absence of a will (20 Pa. C.S.A. §§ 2101 to 2110).
- The laws applicable to the creation and interpretation of wills (20 Pa. C.S.A. §§ 2501 to 2521).
- Chapter Seven of the PEF Code, which contains statutory provisions relating to procedure in the Orphans' Court Divisions in Courts of Common Pleas throughout Pennsylvania (20 Pa. C.S.A. §§ 701 to 794).
- Chapter Nine of the PEF Code, which contains provisions relating to the Register of Wills (20 Pa. C.S.A. §§ 901 to 925).

Practitioners should also consult:

- The Pennsylvania Supreme Court Orphans' Court Rules, which contain the administrative rules for estate proceedings (Pa. O.C. Rules 1.1 to 16.12).
- The local Orphans' Court rules for the county in which they may be practicing. Many courts have different local rules, procedures, forms, and customs and preferred practices that can change without notice.

In addition to being aware of differences in local court procedures, practitioners must also exercise care to use only the mandatory forms prescribed by the Pennsylvania Supreme Court where a particular form exists (Pa. O.C. Rule 1.8 and see PA Courts: Orphans' Court Forms).

PRELIMINARY REQUIREMENTS FOR ANCILLARY PROBATE GENERALLY

While most of a decedent's assets will generally be located in the decedent's state of domicile, sometimes a decedent dies in the decedent's home state while owning a property interest in Pennsylvania, such as:

- Personal property titled or located in Pennsylvania.
- Real property located in Pennsylvania.
- A cause of action for wrongful death against a Pennsylvania domiciliary.

An appropriate ancillary proceeding generally empowers a fiduciary to gather and administer the decedent's Pennsylvania property under Pennsylvania law.

An ancillary proceeding is not necessary for property that:

- Passes by title, such as a payable on death account.
- Passes by operation of law, such as real property held in a joint tenancy or as tenants by the entireties.
- Is held in a trust.

ADMINISTRATION IN DECEDENT'S DOMICILE REQUIRED

In Pennsylvania, an ancillary probate is granted only where there is an estate proceeding pending in the decedent's domiciliary jurisdiction. If there is no proceeding in a decedent's home state, a regular probate proceeding can be instituted in Pennsylvania to probate the non-domiciliary individual's Pennsylvania property. (20 Pa. C.S.A. § 3151 and see Practice Note: Understanding Probate in Pennsylvania ([w-000-3710](#))). An ancillary proceeding is therefore secondary to an estate proceeding instituted in the state of the decedent's domicile. There are two ways to administer an ancillary proceeding in Pennsylvania:

- Under Section 3136 of the PEF code, if the decedent died with a will (see *Wills Probate Outside the Commonwealth: PEF Code 3136*).
- Under Section 4101 of the PEF code, if the decedent died with or without a will (see *Powers of Foreign Fiduciaries: PEF Code 4101*).

Wills Probated Outside the Commonwealth: PEF Code 3136

If the primary domiciliary probate was based on a will, then the personal representative has two options for proceeding in Pennsylvania, under either PEF Code 3136 or PEF Code 4101.

To proceed under PEF Code 3136, the foreign personal representative must file with the Register of Wills in a County in which the Decedent's property is located a duly authenticated copy of a will proved outside of the Commonwealth according to the law of the place of probate with the Register of Wills in a county in which the decedent's property is located (20 Pa. C.S.A. § 3136). If the decedent did not have a will, this procedure is not available and the personal representative may open an ancillary administration only under Section 4101 of the PEF Code (see *Powers of Foreign Fiduciaries: PEF Code 4101*).

If a duly authenticated copy of the record of the probate proceeding of the original instrument is not submitted, the will must be proved in Pennsylvania by the oaths of two witnesses (20 Pa. C.S.A. §§ 3132, 3136).

If the will was probated in a foreign country, an ancillary probate in Pennsylvania under Section 3136 of the PEF Code is still allowed. However, if an essential requirement of Pennsylvania law for a valid will has not been met, the probate proceedings may be supplemented by the submission of additional evidence to the Register of Wills. (20 Pa. C.S.A. § 3136.)

Powers of Foreign Fiduciaries: PEF Code 4101

If the decedent died intestate, the foreign personal representative may proceed in Pennsylvania only under Section 4101 of the PEF Code.

PEF Code 4101 also provides an alternative to the procedure of PEF Code 3136 where the primary domiciliary administration was based on a will.

To proceed under PEF Code 4101, the foreign fiduciary (a personal representative, executor, or trustee in the domiciliary jurisdiction) must file with the Register of Wills of the county where the power is to be exercised, the proceeding is to be instituted, or the decedent's property is located:

- An exemplified copy of the foreign fiduciary's appointment or other qualification in the foreign jurisdiction.
- An exemplified copy of the will or other instrument, if any, under which the foreign fiduciary has been appointed or qualified.
- An affidavit stating that:
 - the estate of which the foreign fiduciary is fiduciary is not indebted to any person in Pennsylvania; and
 - the foreign fiduciary will not exercise any power which the foreign fiduciary would not be permitted to exercise in the jurisdiction of the foreign fiduciary's appointment.
- An exemplified copy of the foreign fiduciary's official bond, if the foreign fiduciary has given a bond. The court may require security or additional security in Pennsylvania or in the domiciliary jurisdiction and may order the action or proceeding stayed until sufficient security is furnished.

(20 Pa. C.S.A. §§ 4101, 4104.)

If a decedent owned property in more than one county in Pennsylvania, or if the foreign fiduciary needs to exercise powers in more than one county, it is more difficult to proceed under PEF Code 4101 because this same procedure must be followed in every county. However, if the decedent died intestate, the foreign fiduciary has no other option.

The foreign fiduciary cannot exercise the foreign fiduciary's powers in Pennsylvania in the first month after the decedent's death (20 Pa. C.S.A. § 4101(3)).

When a foreign fiduciary exercises a power to sell or mortgage any Pennsylvania real estate, the foreign fiduciary must pay or provide for all taxes due to Pennsylvania (or to any subdivision of the Commonwealth) (20 Pa. C.S.A. § 4101(4)).

ALTERNATE PROCEDURES FOR SECURITIES AND BANK ACCOUNTS: PEF CODE 4102

PEF Code 4102 provides an alternate procedure for a foreign fiduciary dealing with securities or bank accounts. If there is no administration in Pennsylvania, a foreign fiduciary on submission of a certificate of his appointment has all of the powers of a similar local fiduciary with respect to:

- Stock, bonds, and other securities of a Pennsylvania corporation or of a federal corporation located in Pennsylvania.
- Money deposited or invested in a financial institution located in Pennsylvania.

(20 Pa. C.S.A. §4102.)

The fiduciary is not required to comply with the conditions and limitations of Section 4101 (see Powers of Foreign Fiduciaries: PEF Code 4101). For money deposited or invested in a financial institution located in Pennsylvania, the foreign fiduciary must submit to the financial institution an affidavit stating that, after diligent search and inquiry:

- The estate is not, to his knowledge or so far as he has discovered, indebted to any person in Pennsylvania.
- Any taxes owed by the estate to Pennsylvania (or any subdivision of Pennsylvania) have been paid or provided for.

(20 Pa. C.S.A. § 4104.)

The term "financial institution" means a bank, a bank and trust company, a trust company, a savings and loan association, a building and loan association, a credit union, a savings bank, a private bank, or a national bank (20 Pa. C.S.A. § 4104).

DISTRIBUTIONS TO DECEASED NON-RESIDENT CREDITORS OR DISTRIBUTEES

When a share of an estate administered in Pennsylvania is distributable to a deceased nonresident who is a creditor or other distributee of the Pennsylvania estate, unless it appears that the rights of any Pennsylvania resident may be adversely affected or the court determines that ancillary administration of that deceased nonresident's estate in Pennsylvania is advisable, the court may award the share to either:

- The domiciliary personal representative of the creditor or distributee.
- Another person performing the function of a personal representative of the creditor or distributee in the domiciliary state.

(20 Pa. C.S.A. § 4111.)

DISTRIBUTION TO FOREIGN TRUSTEE, GUARDIAN, OR COMMITTEE

There are special rules for distribution when a share of an estate administered in Pennsylvania is distributable to:

- A nonresident minor.
- A trustee subject to the jurisdiction of a foreign court.
- A nonresident incapacitated person.

In these situations, the court may award the share to the guardian or committee of the nonresident appointed in the foreign jurisdiction, or to the trustee (20 Pa. C.S.A. § 4112).

If an applicable will or trust does not direct distribution to the foreign guardian, committee, or trustee, the court must confirm that adequate security or other protection has been provided in the domiciliary jurisdiction by the domiciliary law for the protection of the persons beneficially interested in the awarded share (20 Pa. C.S.A. § 4112).

RETAINING A PENNSYLVANIA LAWYER

When a non-domiciliary dies owning property in Pennsylvania that requires an ancillary proceeding, the family of the decedent or the domiciliary personal representative typically hires a Pennsylvania lawyer to help administer the Pennsylvania property. Pennsylvania counsel familiar with the ancillary probate process in Pennsylvania can be valuable and likely necessary to avoid unauthorized practice of law within Pennsylvania. The Pennsylvania lawyer typically:

- Advises which probate proceeding to institute.
- Files the ancillary probate proceeding in the appropriate Pennsylvania county (see Venue for Ancillary Probate Proceeding).
- Prepares the Pennsylvania Inheritance Tax Return, if necessary.
- Makes all necessary court appearances.
- Assists the ancillary fiduciary with the administration of the property and the closing of the ancillary estate (see Administration and Distribution of an Ancillary Estate).

VENUE FOR ANCILLARY PROBATE PROCEEDING

The proper venue for an ancillary proceeding in Pennsylvania depends on whether the decedent owned property in a single Pennsylvania county, in multiple counties, or owned no property in any Pennsylvania county.

The will of a decedent who had no domicile in Pennsylvania may be probated before the Register of any county where any of the decedent's property is located (20 Pa. C.S.A. § 3131).

For any proceeding under Section 4101 of the PEF Code, the foreign fiduciary must file the required records in every county in which the foreign fiduciary intends to act (20 Pa. C.S.A. § 4101 and see Powers of Foreign Fiduciaries: PEF Code 4101).

PROPERTY IN A SINGLE COUNTY

If the decedent owned property in only one county in Pennsylvania, the proper venue for the ancillary probate proceeding is the county where the property is located (20 Pa. C.S.A. § 3131). Venue for any subsequent matter relating to the ancillary proceeding remains in the county where the proceeding is first commenced (20 Pa. C.S.A. § 721(1)).

PROPERTY IN MULTIPLE COUNTIES

If the decedent owned property in multiple counties in Pennsylvania, the proper venue for the ancillary probate proceeding is any county in which a portion of the decedent's Pennsylvania property is situated (20 Pa. C.S.A. § 3131). Venue for any subsequent matter relating to the ancillary proceeding remains in the county where the proceeding is first commenced (20 Pa. C.S.A. § 721(1)).

PROPERTY IN NO COUNTY

If the decedent owned property in no county in Pennsylvania, letters can be issued by the Register of any county in Pennsylvania (20 Pa. C.S.A. § 3151).

APPOINTMENT OF ANCILLARY EXECUTOR OR ADMINISTRATOR

LETTERS EVIDENCING APPOINTMENT

The proposed ancillary fiduciary must petition the Register of Wills with jurisdiction for the grant of letters evidencing the ancillary fiduciary's appointment and authority to act with respect to the decedent's Pennsylvania property (20 Pa. C.S.A. §§ 3151 to 3163). Once the Register of Wills issues letters, the ancillary fiduciary or the estate's Pennsylvania counsel can obtain certificates of these letters from the Register (called "short certificates"). The short certificates are certified by the Register of Wills, contain an official court seal, and provide evidence that the ancillary fiduciary's appointment is effective. The form, cost, and process for obtaining short certificates varies by county and is not governed by statute or court rule.

In Pennsylvania, short certificates are generally accepted for a period of 60 days, but the fiduciary or his lawyer can obtain more certificates from the Register of Wills for a nominal fee, if the ancillary fiduciary's appointment remains in good standing.

ORDER OF PRIORITY FOR ANCILLARY LETTERS

The court issues ancillary letters testamentary only to a petitioner who has been appointed as personal representative of the estate in the decedent's domicile (20 Pa. C.S.A. §§ 3136).

REQUIREMENTS OF PETITIONER FOR ANCILLARY LETTERS

Qualification as a Pennsylvania Fiduciary

A petitioner for ancillary letters must generally meet the same requirements that apply to personal representatives.

An ancillary personal representative must be:

- Over 18 years of age.
- A corporation authorized to act as fiduciary in Pennsylvania.
 - Not charged with voluntary manslaughter or homicide, except homicide by vehicle, in connection with a decedent's death unless and until the charge is withdrawn, dismissed, or a verdict of not guilty is returned.

(20 Pa. C.S.A. § 3156.)

Fiduciary Bond

When a bond is required, the ancillary personal representative must purchase a bond and file it with the Register of Wills before the Register can issue letters (20 Pa. C.S.A. § 3174).

The bond is set at the amount the Register considers necessary. The Register must consider the value of the personal estate which will come into the control of the ancillary personal representative. (20 Pa. C.S.A. § 3171.)

No bond is required of a corporate fiduciary if it is:

- A bank or trust company incorporated in Pennsylvania.
- A national bank with its principal office in Pennsylvania.
- A foreign corporate fiduciary or a national bank with its principal office outside of Pennsylvania, which is otherwise qualified to act if the laws of the state in which it is incorporated or in which the national bank is located provide

a similar exemption for corporations existing under the laws of Pennsylvania.

(20 Pa. C.S.A. § 3174(a).)

No bond is required of an individual fiduciary if the individual fiduciary:

- Is named in the will as an original or successor personal representative and:
 - is a resident of Pennsylvania; or
 - is not a resident of Pennsylvania but will serve with a resident co-personal representative of whom no bond is required, if the petition for letters includes an averment that all assets will remain in the custody and control of the resident co-personal representative.
- Is not named in the will, if any, as an original or successor personal representative but is a resident of Pennsylvania and is either the sole residuary legatee or next of kin or is the nominee of all residuary legatees or next of kin who are adult and *sui juris*.

(20 Pa. C.S.A. § 3174(b).)

Where the will dispenses with the filing of a bond by the named fiduciary, the bond requirement is waived unless the court exercises its discretion to impose bond (20 Pa. C.S.A. § 3174(b)).

ANCILLARY PROBATE

PARTIES FILING THE PETITION FOR ANCILLARY PROBATE

An ancillary probate proceeding may be commenced only by a person or institution appointed as a personal representative in the decedent's domicile (20 Pa. C.S.A. § 3136). If there is no domiciliary personal representative, a regular probate proceeding must be commenced (see State Q&A, Probate: Pennsylvania ([w-013-5302](#))). If a domiciliary personal representative does not qualify to serve in Pennsylvania, counsel should call the register of wills in the county where the proceeding will occur to seek their procedural guidance.

CONTENTS OF THE PETITION FOR ANCILLARY PROBATE

There is no state-wide form of petition for ancillary probate or administration. Therefore, any Petition for Ancillary Probate generally must follow the state-wide form for a general petition for grant of letters (see PA Courts: Petition for Grant of Letters). The form must be customized to indicate the request is for ancillary probate, since the form is not designed. There may be local forms available for a petition for ancillary probate in certain counties (see, for example, Butler County: Petition for Grant of Ancillary Letters).

NOTICE REQUIREMENT

There is no notice required before the Register of Wills issues ancillary letters. After the Register issues letters, the fiduciary must give notice of administration to the required persons under statute (Pa. O.C. Rule 10.5). The procedure for notice of administration in this circumstance is identical to the procedure in a domiciliary administration in Pennsylvania. For more information on domiciliary probate proceedings in Pennsylvania and the notice requirements specifically, see State Q&A, Probate: Pennsylvania: Who is Entitled to Receive Notice ([w-013-5302](#)).

ANCILLARY PROBATE WITHOUT LETTERS

There is no Pennsylvania procedure for ancillary probate without requesting ancillary letters.

PROOF OF WILL

In a proceeding under Section 3136 of the PEF Code, the will must be proved in Pennsylvania by the oaths of two witnesses. However, if a duly authenticated copy of the record of the probate proceeding of the original instrument is also submitted, no independent proof is needed (20 Pa. C.S.A. § 3136.) Section 4101 of the PEF Code imposes various filing requirements, but does not require proof of the will (see Powers of Foreign Fiduciaries: PEF Code 4101).

OFFICIAL FORMS

When preparing an ancillary probate or an ancillary administration petition and supporting documents, counsel should use the official forms provided as an appendix to the Pennsylvania Supreme Court Orphans' Court Rules (see PA Courts: Orphans' Court Forms).

When there is no official statewide form, it is helpful to ask the local Orphans' Court clerk or Register of Wills for a form example, which it may have available.

ADMINISTRATION AND DISTRIBUTION OF AN ANCILLARY ESTATE

POWERS AND DUTIES OF ANCILLARY FIDUCIARY

An ancillary fiduciary is generally under the same obligations and has the same responsibilities, powers, and duties as a fiduciary of a Pennsylvania domiciliary estate (see State Q&A, Probate: Pennsylvania: Administering the Estate ([w-013-5302](#))).

The job of the ancillary fiduciary generally is to:

- Gather the assets in Pennsylvania.
- Pay any administration expenses or claims arising from a creditor domiciled in Pennsylvania (see Payment of Expenses and Claims).
- Pay any tax liability arising from the Pennsylvania property.

PAYMENT OF EXPENSES AND CLAIMS

One of the primary jobs of the ancillary fiduciary is to pay any:

- Administration expenses arising from the ancillary proceeding.
- Creditors' claims.

Payment of Expenses

The ancillary fiduciary should pay any expenses incurred by the decedent's estate in connection with the ancillary proceeding. These expenses can include:

- Court fees.
- Attorneys' fees for the Pennsylvania attorney involved in the ancillary proceeding.
- Any fees associated with the administration of the Pennsylvania property.

The ancillary fiduciary should generally make these payments, as well as any payments to Pennsylvania creditors, from the

assets located in Pennsylvania that are the subject of the ancillary proceeding.

Payment of Claims

The creditor process for an ancillary estate is identical to the process in a domiciliary estate. When the estate is solvent the ancillary fiduciary may pay any claims brought against the decedent's estate, whether by Pennsylvania or non-Pennsylvania creditors, and may also pay Pennsylvania legatees (*In re Middleby's Estate*, 94 A. 820 (Pa. 1915)). However, in an insolvent estate, the ancillary fiduciary may not favor Pennsylvania creditors over non-Pennsylvania creditors (*Blake v. McClung*, 172 U.S. 239 (1898)).

For more information on creditor's claims, see State Q&A, Probate: Pennsylvania: Considerations for Creditors' Claims.

DISTRIBUTION OF ASSETS

After an estate has been fully administered in Pennsylvania, including payment of all expenses of administration of the ancillary estate and claims of creditors, the court may order the remaining property held by the ancillary fiduciary to be:

- Paid to the fiduciary in his capacity as fiduciary in the decedent's domiciliary jurisdiction.
- Distributed directly from the ancillary fiduciary to the beneficiaries.
- Distributed directly from the ancillary fiduciary to the creditors.

(*Middleby's Estate*, 94 A. at 820 and see Payment of Expenses and Claims.)

WILL SUBJECT TO CONTEST

Pennsylvania has no statutory provision regarding contest of the decedent's will in the domiciliary jurisdiction. Although property subject to ancillary probate can be distributed to the estate

beneficiaries or transferred to the decedent's domiciliary jurisdiction, best practice is for the ancillary fiduciary to file an account of his administration and make distribution only after receipt of a discharge by the court (20 Pa. C.S.A. § 3184).

PROBATE REVOKED IN DOMICILIARY JURISDICTION

No act by a personal representative, including an ancillary fiduciary, in good faith will be impeached by the subsequent revocation of letters or by the subsequent probate of a will, a later will, or a codicil. Regardless of the good or bad faith of the personal representative, no person who deals in good faith with a duly qualified personal representative shall be prejudiced by the subsequent occurrence of any of these contingencies. (20 Pa. C.S.A. § 3329.)

CONFIDENTIAL PERSONAL INFORMATION

By their nature, filings in probate and Orphans' Court proceedings often contain confidential identifying and financial information, such as Social Security or bank account numbers. To protect privacy and deter identity theft, parties should omit or redact all but the last four digits of the following from court filings:

- Taxpayer identification numbers, including social security numbers.
- Financial account numbers, including bank account and credit or debit card numbers.

Local rules may also require parties to redact additional information from electronic filings. Counsel should carefully review local rules to ensure compliance before filing.

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