

SCHEDULE "K"
UNDISTRIBUTED ASSETS
 (use only in accounts that are not final)

List below all assets held at the end of the accounting period. Each asset must be listed separately and described fully.

Example:

500 shares Thomas Enterprises, Inc. common stock
 \$10,000.00

Upstanding Trust Company savings account no. 01-23-5
 5,825.63

In trust cases, it is necessary to provide a breakdown as to principal and income.

To determine principal

Totals from Schedules A, B and C \$ _____
 Adjustments per Schedules C(2) \$ _____
 Disb. Per Schedules F, G and I \$ _____ \$ _____

To determine income

Totals Schedule D and E \$ _____
 Disb. Schedules H and J \$ _____ \$ _____

	Disbursements
	\$
If continuation sheet(s) are used, enter total of same here.....	\$
Total (carry forward to summary)	\$

Provide a detailed explanation as to why the estate is held open (See Schedule K1).

SCHEDULE “K1”
WHY ESTATE REMAINS OPEN
(use only in accounts that are not final)

For each of the assets held at the end of the accounting period in schedule K, explain fully the efforts underway to complete administration. Each asset must be listed separately.

1. For Real Property located in the District of Columbia that is being transferred to heirs or legatees a complete explanation of why the transfer has not taken place and the estimated date of the distribution.
2. For Real Property located in the District of Columbia that is being sold, the date placed on the market, copy of the appraisal or other basis for sales price and copy of the MSL listing.
3. For Real Property located outside of the District of Columbia, a file stamped copy of petition or certificate from other jurisdiction where the real property is located and an explanation of the steps taken to administer that property, including date triple seal was ordered and estimated date of distribution.
4. For Unclaimed Property a copy of the unclaimed property filing or a copy of the determination of claim letter from the District of Columbia Unclaimed Property Division.
5. For Litigation and/or Cases on Appeal copy of docket and affidavit from counsel in civil action reflecting activity
6. For all other undistributed property, proof that the asset has been marshaled by the estate and an estimate date of distribution and a detailed explanation of any other reason why the estate remains open.

If continuation sheet(s) are used, please attach

Schedule K1 – Instructions

The account filed _____ requires a schedule K1. Please complete the attached K1 and return to the assigned auditor at:

D.C. Superior Court
Probate Division
515 5th Street, NW
Third Floor
Washington, DC 20001
Attn: _____

The assigned auditor can be determined by:

1. Review the docket at www.dccourts.gov. Click Remote Access to the Superior Court Dockets and obtain your docket by case number or name search.
2. Call 879-9434 to ascertain the name of the assigned auditor.