

Commonwealth of Massachusetts

The Trial Court

Plymouth Division

Probate and Family Court Department

Docket No. \_\_\_\_\_

Account

Account of \_\_\_\_\_
and \_\_\_\_\_
as \_\_\_\_\_
(Specify type of fiduciary and name of estate)

This account is for the period of \_\_\_\_\_ to \_\_\_\_\_ inclusive.

Principal amounts received per Schedule A \$ \_\_\_\_\_

Principal payments and charges per Schedule B \$ \_\_\_\_\_

Principal balance invested per Schedule C \$ \_\_\_\_\_

Market value as of \_\_\_\_\_ (date) per Schedule C \$ \_\_\_\_\_

Income received per Schedule D \$ \_\_\_\_\_

Payments from income per Schedule E \$ \_\_\_\_\_

Income balance per Schedule F \$ \_\_\_\_\_

The United States Veterans' Administration is - is not - a party in interest to this account. The ward is - is not - a patient in a State Hospital.

I - We certify under the penalties of perjury that the within account is just and true.

Date \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature of Fiduciary

The undersigned, being \_\_\_\_\_ interested, having examined the foregoing account, request that the same may be allowed without further notice.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

For Petitioner:  
\_\_\_\_\_  
\_\_\_\_\_

Docket No. \_\_\_\_\_

**Account**

Tel No. \_\_\_\_\_

For Respondent:  
\_\_\_\_\_  
\_\_\_\_\_

Filed \_\_\_\_\_ 20 \_\_\_\_\_

Citation Issued \_\_\_\_\_ 20 \_\_\_\_\_

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Tel. No. \_\_\_\_\_

Allowed \_\_\_\_\_ 20 \_\_\_\_\_

Publication in the \_\_\_\_\_  
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**Instructions**

Refer to Massachusetts General Laws Chapter 206.  
(Suggested format for Schedules and use continuation sheets as needed)

SCHEDULE A shall contain the amount of personal property and with respect to a trustee, guardian or conservator, also the amount of real property, per inventory or balance of principal according to next prior account, and amounts received on account of principal or gains from the sale of any property.

SCHEDULE B shall contain amounts paid out and charges on account of principal, losses and distributions of estates.

SCHEDULE C shall contain the investment of the balance of such account with market values of all assets separately stated. A final account of fiduciary shall contain no balance in this Schedule. Schedule C requires both appraised (book) and market values (P.R. 29A).

SCHEDULE D **trustees** only shall report balance of income according to next prior account and amounts received on account of income.

SCHEDULE E **trustees** only shall report payments chargeable to income.

SCHEDULE F **trustees** only shall report balance of income.