

STATE OF VERMONT

SUPERIOR COURT
Unit

PROBATE DIVISION
Case No. _____

In re TRUST of:

Decedent

☐ **For the BENEFIT of:** _____

SUMMARY OF ACCOUNT OF TRUSTEE

I, _____, trustee of the above-named trust estate account to the court as provided in this summary and the schedule attached hereto for the period _____ to _____.

	SCHEDULE*	INITIAL OR CARRYING VALUE	CURRENT OR MARKET VALUE **
<u>PRINCIPAL</u>			
Total from inventory or previous accounting		_____	_____
Receipts	A	_____	_____
Net gain (or loss) on sales or other disposition	B	_____	_____
Less disbursements	C	_____	_____
Balance before distributions		_____	_____
Distributions to beneficiaries	D	_____	_____
Principal balance on hand	E	_____	_____
For information only:	F	_____	_____
A. Investments made			
B. Changes in investment holdings			

INCOME

Total from inventory or previous accounting		_____	_____
Receipts	G	_____	_____
Less disbursements	H	_____	_____
Balance before distributions		_____	_____
Distribution to beneficiaries	I	_____	_____
Income balance on hand		_____	_____

Combined balance on hand

Proposed distribution to
beneficiaries, or income
balance in hands of trustee
(for interim account only)

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NOTE: *Use of the Attached Schedules is optional, as long as the information is provided in the manner specified on the Schedules. The detail for relatively simple or brief accounts may be put on one.

**Use current value if known or if directed by the court.

I, _____, trustee of the above named trust estate declare under oath that I have fully and faithfully discharged the duties of my office to the present date; that the foregoing account is true and correct and discloses all significant transactions occurring during the accounting period; that all known expense of the estate have been paid in full, except as provided herein; that, to my knowledge, there are no claims now outstanding against the estate; and that all taxes presently due from the estate have been paid.

I declare that the above statements are true and accurate to the best of my knowledge and belief. I understand that if the above statements are false, I will be subject to the penalty of perjury or to other sanctions in the discretion of the court.

Date: _____

Signature of Trustee

Printed Name

In Re Trust of: _____
For the Benefit Of: _____
Account Period: _____ to _____

NOTICE: A certificate of service must be filed with the Court by the person who submits this document. The certificate must list each person to whom copies of this document have been sent, together with the person's address, the date of service and the manner of service (e.g., first class mail). See form 124.

MOTION TO ALLOW ACCOUNT*

I, _____, trustee of the above-named trust, move the court to allow this account.

Date: _____

Signature of Trustee

Printed Name

ORDER

Examined on oath and allowed,

Date: _____

Signature of Judge

Note: * V. R. P. P. 66(d) requires that, in a trust proceeding, a motion to allow account to be filed no less frequently than every third year.