



**INFORMAL FINAL SETTLEMENT:
AFFIDAVIT, MOTION, AND ORDER**

Case No. _____
Court _____ District/Probate _____
County _____

IN RE: Estate of _____

Date of Death _____ Social Security Number _____
(month, day, year)

AFFIDAVIT/MOTION

Comes the affiant, being first duly sworn, and states as follows:

1. Six months have passed since my appointment as fiduciary to the above estate.
2. () I am sole beneficiary.

() I am not sole beneficiary, but I have attached a verified waiver from each beneficiary (AOC-851). (No verified waiver is required of the "nonresiduary legatee," a beneficiary who has received and receipted for his/her share pursuant to a specific will provision. The cancelled check or signed receipt is attached as evidence of satisfaction.)

3. The estate is solvent.
4. () All legal claims and debts have been paid.
() All legal claims and debts have not been paid, but have been provided for in the following manner:
_____.

5. All inheritance, estate or similar death taxes have been paid. A duplicate or photocopy of such tax releases is attached, if available.

6. All court costs have been paid.

7. () My attorney's fee is _____. His/her name and address:

Name: _____

Address: _____

() I do not have an attorney.

8. Each beneficiary has received his/her share.

I ask this Court to dispense with the requirements of KRS Chapter 395 regarding settlement of fiduciaries' accounts and dispense with the requirements of a surety for the fiduciary and accept this informal settlement as final settlement.

Affiant

Address

Phone Number

Subscribed and sworn to before me this _____, _____, _____.
(month) (day) (year)

Name/Title

ORDER

Upon the affidavit/motion of the above affiant/fiduciary,

IT IS HEREBY ORDERED that the requirements of KRS Chapter 395 regarding settlement of fiduciaries' accounts and the requirements of a surety for the fiduciary are waived, the informal settlement is filed, and the fiduciary (and surety, if any) is discharged.

Date

Judge

NOTICE TO CLERK AND JUDGE: When a settlement is effected in the informal manner, no notice to any person shall be required (for example, NO ADVERTISEMENT IS REQUIRED) nor shall the court be compelled to inquire into detailed items of income or disbursements. KRS 395.605(1).

Distribution:
Original - Court File
Copy - Affiant / Attorney