

STATE OF MINNESOTA

COUNTY OF \_\_\_\_\_

\_\_\_\_ JUDICIAL DISTRICT  
DISTRICT COURT  
PROBATE DIVISION

In the Matter of the Trust Created under Article \_\_\_\_ of  
the Last Will of \_\_\_\_\_.

Court File No. \_\_\_\_\_

**ALTERNATIVE FOR INTER VIVOS TRUSTS:**

In the Matter of the Trust Created under Agreement By  
and Between \_\_\_\_\_, Settlor, and \_\_\_\_\_,  
Trustee, dated \_\_\_\_\_.

**ORDER ALLOWING ACCOUNT DATED \_\_\_\_\_  
PURSUANT TO MINN. STAT. § 501C.0202**

The Petition to Allow Account Dated \_\_\_\_\_ Under Minnesota Statutes section 501C.0202, signed by  
\_\_\_\_\_ dated \_\_\_\_\_, came before this Court on \_\_\_\_\_. The Court, having  
heard and considered the Petition, determines the following:

1. This Court has jurisdiction in this proceeding  in rem,  in personam. Venue in this County is proper.
  2. The Petition is complete.
  3. Any notice required by Minnesota law has been given and proved, and any time for notice has expired.
  4. The Petitioner has declared or affirmed that the representations contained in the Petition are true and complete to the best of Petitioner's knowledge and belief.
  5. The Court itself represents all persons in interest who are minors or otherwise incompetent or unascertained or not in being or unknown to the Trustee or outside of Minnesota.
  6. The Trust instrument consists of:  
 the Last Will of \_\_\_\_\_, dated \_\_\_\_\_.  
or  
 an agreement by and between \_\_\_\_\_, Settlor, and \_\_\_\_\_ Trustee, dated  
\_\_\_\_\_.
- A true and correct copy of the instrument is on file with this Court and is made a part of this Petition.
7. The Petitioner is the duly appointed, qualified and acting Trustee of the Trust. Petitioner's appointment as Trustee was:  
 not confirmed by the Court.  
or  
 confirmed by an Order of this Court pursuant to Minnesota Statutes  § 501.33,  § 501B.22, or  § 501C.0202, which is on file with the Court.  
and  
 released by an Order of the Court dated \_\_\_\_\_ pursuant to Minnesota Statutes 501.351, 501B.19 or 501C.0202.

8. The Petitioner is the acting Trustee of the Trust and, for the purposes of the Petition, submitted to the jurisdiction of the Court.
9. The Petitioner has declared or affirmed that the representations contained in the Petition are true and complete to the best of the Petitioner's knowledge and belief.
10. The Trustee's account dated \_\_\_\_\_, covering the continuous administration of the Trust from \_\_\_\_\_ through \_\_\_\_\_, has been filed with this Court. The account contains the following:
  - a. A statement of the total inventory or carrying value and of the fair market value, if reasonably ascertainable, of the assets of the Trust principal as of the beginning of the accounting period.
  - b. A complete itemized inventory of the assets of the Trust principal as of the end of the accounting period, showing both the inventory or carrying value of each asset and also the fair market value of each asset as of such end of the accounting period.
  - c. An itemized statement of all income transactions during the period of such account.
  - d. A summary statement of all income transactions during the period of such account, including the totals of distributions of income to beneficiaries and the totals of Trustees' fees and attorneys' fees charged to income.
  - e. An itemized statement of all principal transactions during the period of such account.
  - f. A reconciliation of all principal transactions during the period of such account, including the totals of distributions of principal to beneficiaries and the totals of Trustees' fees and attorneys' fees charged to principal as well as the totals of liquidations and reinvestments of principal cash.
  - g. A list of all assets that realized a net income less than one percent of the inventory value or acquisition cost, and an explanation of the amount of net income realized and the reasons for retaining the assets.

The account is true and correct.

11. No objections to the Petition have been filed with the Court.

The Court represents [or has appointed a representative to represent] all persons in interest who are minors or incapacitated, or unborn, unascertained or whose identity or address is unknown and not reasonably ascertainable, and has determined that all other persons with an interest in the trust are represented under sections 501C.0301 to 501C.0304.

**IT IS ORDERED:**

1. The Trustee's account dated \_\_\_\_\_ covering the continuous administration of the Trust from \_\_\_\_\_ through \_\_\_\_\_ is approved and allowed.
2. All acts of the Trustee in selling or retaining Trust assets, in investing the funds of the Trust in the securities and properties shown in the account, and in charging or crediting disbursements or receipts to principal or income as shown in the account, and, in general, approving and confirming in all respects all acts of the Trustees in the administration of the Trust up to and including \_\_\_\_\_ are approved.

3. The sum of \$ \_\_\_\_\_ constitutes reasonable attorneys' fees and expenses to be paid to the law firm of \_\_\_\_\_ for legal services rendered to the Trustee in connection with this matter and the distribution of the Trust.

SAMPLE  
DOCUMENT

BY THE COURT

Date: \_\_\_\_\_

\_\_\_\_\_  
Judge of District Court

(COURT SEAL)

SAMPLE  
DOCUMENT