STATE OF NORTH CAROLINA

File No.

_____ County

In The General Court Of Justice
Superior Court Division
Before The Clerk

IN THE MATTER OF THE ESTATE OF

Name Of Decedent/Trust/Ward

T O *Name And Address Of Fiduciary*

NOTICE TO FILE

G.S. 28A-20-2; 28A-21-1 to 28A-21-4; 28A-25-3; 35A-1242; 36C-2-208, -209

☐ *Estate* ☐ *Trust* ☐ *Guardianship*

You are hereby notified to file the following:

☐ **INVENTORY**

The inventory is due on _____.
You are reminded that if the required inventory is not filed on or before the date listed above, the law of North Carolina requires the Clerk to issue mandatory orders to compel its filing. To avoid these mandatory orders, file the inventory on or before the date listed above. You should notify your attorney of this Notice, if applicable.

AOC-E-505 is the Inventory form used with decedent's estates.
AOC-E-510 is the Inventory form used with guardianship estates.
AOC-E-511 is the Inventory form used with a trust under a will.
These forms are available via the North Carolina Court system website at www.nccourts.gov/documents/forms.

☐ **ANNUAL ACCOUNT**

The annual account is due on _____.
You are reminded that if the required annual account is not filed on or before the date listed above, the law of North Carolina requires the Clerk to issue mandatory orders to compel its filing. To avoid these mandatory orders, file the annual account on or before the date listed above. You should notify your attorney of this Notice, if applicable.

AOC-E-506 is the Annual Account form used in all types of estates.
This form is available via the North Carolina Court system website at www.nccourts.gov/documents/forms.

☐ **FINAL ACCOUNT or** ☐ **AFFIDAVIT OF COLLECTION, as applicable**

The final account or affidavit of collection, as applicable, is due on _____.
You are reminded that if the required final account/affidavit of collection is not filed on or before the date listed above, the law of North Carolina requires the Clerk to issue mandatory orders to compel its filing. To avoid these mandatory orders, file the final account/affidavit of collection on or before the date listed above. You should notify your attorney of this Notice, if applicable.

AOC-E-204 is the Affidavit form used only when property has been collected by affidavit.
AOC-E-506 is the Final Account form used in all other types of estates.
These forms are available via the North Carolina Court system website at www.nccourts.gov/documents/forms.

☐ **GUARDIANSHIP STATUS REPORT**

The guardianship status report is due on _____.
You are reminded that if the required guardianship status report is not filed on or before the date listed above, the law of North Carolina requires the Clerk to issue mandatory orders to compel its filing. To avoid these mandatory orders, file the guardianship status report on or before the date listed above. You should notify your attorney of this Notice, if applicable.

Pursuant to G.S. 35A-1242, a **Guardianship Status Report**, which may be on the NC DHHS form of that name, is required to be filed.
DHHS has a Sample Status Report form as an appendix to the Guardianship Manual (the Guardianship Manual may be accessed at https://policies.ncdhhs.gov/document/daas-guardianship-manual/).

If you are filing an inventory, be prepared to submit account statements, copies of signature cards and/or other vouchers in support of the filing, if required by this office. If you are filing an annual/final account or affidavit of collection, you must submit account statements, receipts, official copies of cancelled checks, or other vouchers in support of all payments. There may be fees associated with the inventory/accounting/affidavit you are required to file.

Your prompt attention to this matter is required.

Original-Fiduciary Copy-File and Attorney

(Over)

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Copy To	Date
	Signature
	☐ Deputy CSC ☐ Assistant CSC ☐ Clerk Of Superior Court

Comments:

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