

**ADMINISTRATIVE ORDER OF THE
CHIEF ADMINISTRATIVE JUDGE OF THE COURTS**

Pursuant to the authority vested in me, and with the advice and consent of the Administrative Board of the Courts, I hereby add, effective immediately, a new section 207.64 of the Uniform Civil Rules of the Surrogate's Court, relating to public access to certain filings, as follows:

* * *

§ 207.64 Public Access to Certain Filings

The following documents may be viewed only by persons interested in the estate of the decedent, as defined by SCPA §103(39), or their counsel; the Public Administrator or counsel thereto; counsel for any Federal, State or local governmental agency; or court personnel; except upon written permission of the Surrogate or Chief Clerk of the court, which shall not be unreasonably withheld:

- (1) all papers and documents in proceedings instituted pursuant to Articles 17 or 17-A of the SCPA;
- (2) death certificates;
- (3) tax returns;
- (4) documents containing social security numbers;
- (5) Firearms Inventory; and
- (6) Inventory of Assets.



Chief Administrative Judge of the Courts

Dated: February 19, 2014

AO/43/14

SURROGATE'S COURT OF THE STATE OF NEW YORK
IN THE MATTER OF THE ESTATE OF / GUARDIANSHIP OF

- MONROE COUNTY

APPLICATION PURSUANT TO RULE
207.64 FOR ACCESS TO CERTAIN
RECORDS (EX PARTE)

FILE NUMBER _____

I (name & address) _____, respectfully allege:

(Please check one of the following)

_____ I am a "person interested" in this estate/guardianship as that term is defined in SCPA 103(39)(as a beneficiary) or am counsel to the "person interested"

_____ I am the Public Administrator or counsel to the Public Administrator

_____ I am counsel to a Government agency with an interest in the estate or guardianship

And therefore am entitled to view the court record or records listed here without further written permission from the Court (list records):

_____ I am not one of the persons listed above but have a legitimate purpose to view the otherwise restricted records as follows (list records and the purpose for viewing each record):

I understand that the purpose of Rule 207.64 is to protect sensitive information and to limit its dissemination to those with a legitimate purpose in gaining access to said information. I will not divulge or make known in any manner the information obtained via this request to persons not entitled except for the limited purpose and to the extent indicated above.

WHEREFORE, I pray that an order be granted permitting me to examine a copy of the record or records as indicated above for the reasons stated herein .

Applicant

SURROGATE'S COURT OF THE STATE OF NEW YORK
IN THE MATTER OF THE ESTATE OF / GUARDIANSHIP OF

- MONROE COUNTY

ORDER FOR INSPECTION OF
RESTRICTED RECORDS (RULE 207.64)

FILE NUMBER _____

Upon the foregoing application made pursuant to Rule 207.64 showing a need to inspect a copy of the following records in the above captioned matter:

Upon the assurances of the Applicant not to divulge or make known in any manner the information contained in the restricted records, except for the limited purpose and to the extent shown above; and this application having been brought ex parte, it is

_____ ORDERED that a clerk of this court make available the requested records to be examined by the Applicant for the limited purpose stated in the application; but, except as indicated in the above application, the applicant may not reproduce, divulge or make known in any manner the restricted information to those not entitled thereto.

OR

_____ ORDERED that the ex-parte request for access to the restricted records is denied. Applicant may further pursue this request by filing a verified petition on citation to the estate fiduciary or guardian and paying requisite filing fee.

Dated: _____, 20 __

Surrogate