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DO NOT LEAVE ANY ITEMS BLANK

STATE OF NEW YORK
SURROGATE'S COURT: COUNTY OF _____

_____X
In the Matter of the Petition for Successor Letters Testamentary
in the Estate of _____

**PETITION FOR SUCCESSOR
LETTERS TESTAMENTARY**

a/k/a _____

File No. _____

Deceased. _____X

To the Surrogate's Court, County of _____

It is respectfully alleged:

1.(a) The name, citizenship, domicile (or, in the case of a bank or trust company, its principal office) and interest in this proceeding of the petitioner(s) are as follows:

Name: _____

Domicile or Principal Office: _____
(Street and Number)

(City, Village or Town) (State) (Zip Code)
Mailing Address: _____
(If different from domicile)

Citizen of: _____

Name: _____

Domicile or Principal Office: _____
(Street and Number)

(City, Village or Town) (State) (Zip Code)
Mailing Address: _____
(If different from domicile)

Citizen of: _____

Interest(s) of Petitioner(s): [Check one] ☐ Successor Executor(s) named in decedent's Will
☐ Other (Specify) _____

1.(b) The proposed Successor Executor ☐ is ☐ is not an attorney.
[Note: A sole Successor Executor-Attorney must comply with 22 NYCRR §207.16(e)]

1.(c) The proposed Successor Executor ☐ is ☐ is not the attorney-draftsperson, a then-affiliated attorney or employee thereof.
[NOTE: An attorney-draftsperson, a then-affiliated attorney or employee thereof must comply with SCPA §2307-a]

2. The will of the above-named decedent was admitted to probate by the Surrogate's Court of _____
County on _____ and Letters Testamentary were issued to _____
who on _____, ☐ died ☐ other (specify) _____.

[Note: If prior fiduciary is deceased, please provide court with certified copy of death certificate.]

3. The names and addresses of all persons and parties interested in this proceeding having a right to successor letters testamentary prior or equal to the petitioner(s) are as follows:

Name and Relationship	Domicile Address and Mailing Address	Nature of Fiduciary Status
_____	_____	_____
_____	_____	_____
_____	_____	_____

4. The names and addresses of all persons and parties who are named in the will as fiduciaries or beneficiaries, other than those named in paragraph 3 above, are as follows:

Name and Relationship	Domicile Address and Mailing Address	Description of Legacy, Devise or Other Interest, or Nature of Fiduciary Status
_____	_____	_____
_____	_____	_____

[Note: If any such person is under a disability state name and post office address of a person upon whom service of process may be made on behalf of such person.]

5. There are no persons other than those hereinbefore mentioned interested in this proceeding.

6.(a) To the best of the knowledge of the undersigned, the property of the estate that remains **unadministered** is as follows:

Personal Property \$ _____ Improved real property in New York State \$ _____

Unimproved real property in New York State \$ _____

Estimated gross rents for a period of 18 months \$ _____

(b) No other testamentary assets exist in New York State, nor does any cause of action exist on behalf of the estate, except as follows: [Enter "NONE" or specify]

WHEREFORE, petitioner(s) pray(s):

That Successor Letters Testamentary issue to _____
in the same manner as original letters, and that he/she/they be authorized to complete the administration of the estate of _____, deceased.

Dated: _____

1. _____
(Signature of Petitioner)

2. _____
(Signature of Petitioner)

(Print Name)

(Print Name)

3. _____
(Name of Corporate Petitioner)

(Signature of Officer)

(Print Name and Title of Officer)

COMBINED VERIFICATION, OATH AND DESIGNATION

[For use when petitioner is an individual]

STATE OF NEW YORK)
COUNTY OF _____) ss.:

The undersigned, the petitioner named in the foregoing petition, being duly sworn, says:

1. VERIFICATION: I have read the foregoing petition subscribed by me and know the contents thereof, and the same is true of my own knowledge, except as to the matters therein stated to be alleged upon information and belief, and as to those matters I believe them to be true.

2. OATH OF SUCCESSOR EXECUTOR as indicated above: I am over eighteen (18) years of age and a citizen of the United States and I will well, faithfully and honestly discharge the duties of Fiduciary of the goods, chattels and credits of said decedent according to law. I am not ineligible to receive letters and will duly account for all moneys and other property that will come into my hands.

3. DESIGNATION OF CLERK FOR SERVICE OF PROCESS: I hereby designate the Clerk of the Surrogate's Court of _____ County, and his/her successor in office, as a person on whom service of any process issuing from such Court may be made in like manner and with like effect as if it were served personally upon me, whenever I cannot be found and served within the State of New York after due diligence is used.

My domicile is : _____
(Street Address) (City/Town/Village) (State) (Zip)

(Signature of Petitioner)

(Print Name)

On _____, _____, before me personally appeared

to me known to be the person described in and who executed the foregoing instrument. Such person duly swore to such instrument before me and duly acknowledged that he/she executed the same.

Notary Public
Commission Expires:
(Affix Notary Stamp or Seal)

Signature of Attorney: _____

Print Name: _____

Firm Name: _____ Tel No. : _____

Address of Attorney: _____

COMBINED CORPORATE VERIFICATION, CONSENT AND DESIGNATION

[For use when a petitioner to be appointed is a bank or trust company]

STATE OF NEW YORK)
COUNTY OF _____) ss.:

I, the undersigned, a _____ of
(Title)

(Name of Bank or Trust Company)

a corporation duly qualified to act in a fiduciary capacity without further security, being duly sworn say:

1. VERIFICATION: I have read the foregoing petition subscribed by me and know the contents thereof, and the same is true of my own knowledge, except as to the matters therein stated to be alleged upon information and belief, and as to those matters I believe them to be true.

2. CONSENT: I consent to accept the appointment as Successor Executor under the Last Will and Testament of the decedent described in the foregoing petition and consent to act as such fiduciary.

3. DESIGNATION OF CLERK FOR SERVICE OF PROCESS: I designate the Chief Clerk of the Surrogate's Court of _____ County, and his/her successor in office, as a person on whom service of any process issuing from such Surrogate's Court may be made, in like manner and with like effect as if it were served personally upon me, whenever one of the fiduciary's proper officers cannot be found and served within the State of New York after due diligence is used.

(Name of Bank or Trust Company)

By _____
(Signature)

(Principal Office Street Address)

(Print Name and Title)

(City/Town/Village)

(State)

(Zip)

On _____, before me personally appeared _____, to me known, who duly swore to the foregoing instrument and who did say that he/she resides at _____ and that he/she is a _____ of _____, the corporation/national banking association described in and which executed such instrument; and that he/she signed his/her name thereto by order of the Board of Directors of the corporation.

Notary Public
Commission Expires:
(Affix Notary Stamp or Seal)

Signature of Attorney: _____

Print Name: _____

Firm Name: _____ Tel. No.: _____

Address of Attorney: _____

STATE OF NEW YORK
SURROGATE'S COURT: COUNTY OF _____ X

In the Matter of the Petition for Successor Letters Testamentary
in the Estate of _____

a/k/a _____

Deceased. _____ X

**RENUNCIATION OF SUCCESSOR
LETTERS TESTAMENTARY AND
WAIVER OF PROCESS (INDIVIDUAL)**

File No. _____

The undersigned, _____, a person
interested in this estate as alternate executor, hereby personally appears in this proceeding in the Surrogate's Court of
_____ County and

1. Renounces all rights to Successor Letters Testamentary.
2. Waives the issuance and service of citation in the above-entitled proceeding.
3. Consents that Successor Letters Testamentary be granted by the Court to _____
or any other person or persons entitled thereto without any notice whatsoever to the undersigned.

Date _____	Signature _____	Street Address _____
	Print Name _____	City/State/Zip _____

STATE OF NEW YORK
COUNTY OF _____ ss.:

On _____, _____, before me personally appeared

_____ to me known to be the person described in and who executed the foregoing instrument. Such person duly swore to such instrument before me and duly acknowledged that he/she executed the same.

Notary Public
Commission Expires:
(Affix Notary Stamp or Seal)

Name of Attorney _____ Tel. No.: _____

Address of Attorney _____

STATE OF NEW YORK
SURROGATE'S COURT: COUNTY OF _____ X

In the Matter of the Petition for Successor Letters Testamentary
in the Estate of _____

a/k/a _____

Deceased. _____ X

**RENUNCIATION OF SUCCESSOR
LETTERS TESTAMENTARY AND
WAIVER OF PROCESS (CORPORATION)**

File No. _____

The undersigned, _____, a person
interested in this estate as alternate executor, hereby personally appears in this proceeding in the Surrogate's Court of
_____ County and

1. Renounces all rights to Successor Letters Testamentary.
2. Waives the issuance and service of citation in the above-entitled proceeding.
3. Consents that Successor Letters Testamentary be granted by the Court to _____
or any other person or persons entitled thereto without any notice whatsoever to the undersigned.

(Signature)

(Name of Corporation)

(Print Name)

(Principal Office Street Address)

(City/Town/Village) (State) (Zip)

Date: _____

STATE OF NEW YORK
COUNTY OF _____ ss.:

On _____, before me personally appeared

_____, to me known, who
duly swore to the foregoing instrument and who did say that he/she resides at _____ and that
he/she is a _____ of _____, the corporation/national banking
association described in and which executed such instrument; and that he/she signed his/her name thereto by order of the
Board of Directors of the corporation.

Notary Public
Commission Expires:
(Affix Notary Stamp or Seal)

Name of Attorney _____ Tel. No.: _____

Address of Attorney _____

STATE OF NEW YORK
SURROGATE'S COURT: COUNTY OF _____X

In the Matter of the Petition for Successor Letters Testamentary
in the Estate of _____

**NOTICE OF PETITION FOR
APPOINTMENT OF
SUCCESSOR EXECUTOR**

a/k/a _____

File No. _____

Deceased. _____X

Notice is hereby given that:

1. The Will of the above-named decedent was admitted to probate by the Surrogate's Court of _____
County on _____, and Letters Testamentary were issued to _____,
who on _____, [] died [] other (specify) _____.

2. The name(s) of the Successor Executor(s) of said Will is/are _____,
whose
address(es) is/are _____

3. The names and address of all persons and parties who are named in the will as fiduciaries or beneficiaries who have
not appeared or have been served or waived service of process.

NAME	MAILING ADDRESS	NATURE OF INTEREST OR STATUS
_____	_____	_____
_____	_____	_____
_____	_____	_____

[Note: If serving infant 14 years of age or older, list and mail to infant as well as parent or guardian.]

(USE ADDITIONAL SHEETS IF NECESSARY)

Date: _____, 20____

[Note: Notice of Petition for Appointment of Successor Executor may or may not be required in all
counties. If Notice is required, complete Affidavit of Mailing.]

Name of Attorney: _____ Tel. No.: _____

Address of Attorney: _____

SLT-4 (04/2011)

AFFIDAVIT OF MAILING
NOTICE OF PETITION FOR APPOINTMENT OF SUCCESSOR EXECUTOR

STATE OF NEW YORK)
) ss.:
COUNTY OF _____)

_____, residing at _____, being duly sworn, says that he/she is over the age of 18 years, that on the _____ day of _____, 20____, he/she deposited in a post office box regularly maintained by the government of the United States in the _____ of _____, State of New York, a copy of the foregoing Notice of Petition for Appointment of Successor Executor contained in a securely closed postpaid wrapper directed to each of the persons named in said Notice at the places set opposite their respective names.

Sworn to before me this _____
day of _____, 20____

Signature

Print Name

Notary Public
Commission Expires:
(Affix Notary Stamp or Seal)

Name of Attorney _____ Tel. No.: _____

Address of Attorney _____

SUCCESSOR LETTERS TESTAMENTARY

File No. _____

SURROGATE'S COURT - _____ COUNTY
CITATION

THE PEOPLE OF THE STATE OF NEW YORK,
By the Grace of God Free and Independent

TO: _____

A petition having been filed by _____, who is
domiciled at _____,

YOU ARE HEREBY CITED TO SHOW CAUSE before the Surrogate's Court, _____ County,
at _____, New York, on _____ 20_____, at _____ o'clock in
the _____ noon of that day, why a decree should not be made in the estate of _____
lately domiciled at _____, directing that

[☐] Successor Letters Testamentary issue to _____.

Dated, Attested and Sealed,

_____,
(Seal)

HON. _____
Surrogate

Chief Clerk

Attorney for Petitioner

Telephone Number

Address of Attorney

[NOTE: This citation is served upon you as required by law. You are not required to appear. If you fail to appear it will be assumed you do not object to the relief requested. You have a right to have an attorney appear for you.]