

Surrogate's Court, Erie County

REQUEST TO ACCESS CONFIDENTIAL RECORDS

Date: _____

Name of Estate: _____

File No.: _____

Your Name: _____

Address: _____

Phone No.: _____

Pursuant to 20 NYCRR 207.64, as amended effective March 1, 2016, the following documents may be viewed only by a party to the proceeding, or the attorney or counsel to a party to the proceeding, the Public Administrator or counsel thereto, or counsel for any Federal, State or local governmental agency:

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. Firearms Inventory;
5. Documents containing information protected from disclosure under other provisions of Federal or State law such as HIPAA for medical information, job protected services reports, material obtained from a state mental hygiene facility under MHL 33.13, and records involving alcohol or other substance abuse under 42 CFR 2.64. These examples are not intended to be exclusive.

Which of the above items are you requesting to view: _____

What is your interest in the estate: Distributee Beneficiary Creditor Other

Reason for request: _____

Please provide the clerk a picture ID. A photocopy of your ID will be made.

Approved: _____

Denied: _____

Name: _____

Title: _____

Date: _____

Note: if denied, a formal application on notice may be made for clarification or reconsideration.