

**JOINT STATE
GOVERNMENT COMMISSION**
General Assembly of the Commonwealth of Pennsylvania

**THE PROBATE, ESTATES AND FIDUCIARIES CODE
AND ORPHANS' COURT MATTERS:
LEGISLATION RECOMMENDED BY THE
ADVISORY COMMITTEE ON
DECEDENTS' ESTATES LAWS
1945 - 2013**

AUGUST 2013



JOINT STATE GOVERNMENT COMMISSION
Serving the Pennsylvania General Assembly Since 1937

The Joint State Government Commission was created by the act of July 1, 1937 (P.L.2460, No.459), as amended, and serves as the primary and central non-partisan, bicameral research and policy development agency for the General Assembly of Pennsylvania.

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To the Members of the General Assembly of Pennsylvania:

The Joint State Government Commission is pleased to present this report, *The Probate, Estates and Fiduciaries Code and Orphans' Court Matters: Legislation Recommended by the Advisory Committee on Decedents' Estates Laws, 1945-2013*, which provides a historical perspective regarding the work of the Advisory Committee. Formed in 1945, the Advisory Committee has generated more than 40 reports that have served as the basis for legislation introduced during numerous legislative sessions of the General Assembly.

On behalf of the Joint State Government Commission, I would like to thank the members of the Advisory Committee, as well as the members of the legislative Task Force on Decedents' Estates Laws, for their dedication to improve Pennsylvania law regarding Title 20 of the Pennsylvania Consolidated Statutes (the Probate, Estates and Fiduciaries Code) and related statutes.

Respectfully submitted,

Glenn J. Pasewicz
Executive Director

JOINT STATE GOVERNMENT COMMISSION

Created in 1937,¹ the Joint State Government Commission serves as the primary and central non-partisan, bicameral research and policy development agency for the General Assembly of Pennsylvania. The Commission has the power to conduct investigations, study issues and gather information, as directed by resolution. In performing its duties, the Commission may call upon any department or agency of the Commonwealth of Pennsylvania for pertinent information and may designate individuals, other than members of the General Assembly, to act in advisory capacities. The Commission periodically reports its findings and recommendations, along with any proposed legislation, to the General Assembly.

The Commission provides in-depth research on a variety of topics, crafts recommendations to improve public policy and statutory law, and works closely with legislators and their staff. Some projects involve an appointed advisory committee of professionals or interested parties from across the Commonwealth with expertise in a particular topic; others are managed exclusively by Commission staff with the informal involvement of representatives of those entities that can provide insight and information regarding the particular topic. Certain projects have specific timelines for the publication of a report, as in the case of a discrete or timely topic; others projects, given their complex or considerable nature, are ongoing and involve the publication of periodic reports.

Most recently, the Commission has released reports concerning the following:

- Administrative Shortages in Public School Districts
- Adoption
- Assisted Reproductive Technologies
- Biomedical Research
- Cervical Cancer
- Child Protection
- Children and Youth Social Service Agency Delivery Systems
- Children of Incarcerated Parents
- Child Safety
- Clean and Green
- Common Interest Ownership Communities
- The Commonwealth Procurement Code

¹ Act of July 1, 1937 (P.L.2460, No.459), amended by the act of March 8, 1943 (P.L.13, No.4), the act of May 15, 1956 (P.L.1605, No.535), the act of December 8, 1959 (P.L.1740, No.646), and the act of November 20, 1969 (P.L.301, No.128).

- Community-Based Mental Retardation Services
- Consumer Credit
 - Motor Vehicle Sales Financing
 - Goods and Services Installment Sales
- Criminal Justice
- Decedents' Estates and the Probate, Estates and Fiduciaries Code
- Developments of Regional Significance and Impact
- Domestic Relations
 - Alimony
 - Custody
 - Divorce
 - Equitable Distribution
- Driver Distractions
- Earned Income Tax Credit and Tax Forgiveness
- Energy Policy
- Exotic Wildlife
- Geriatric and Seriously Ill Inmates
- Guardianships
- Health Care Decision-Making
- Human Trafficking
- Indigent Criminal Defendants
- Influenza Prevention and Control
- Information Disclosure of State-Related Universities
- Instructional Output and Faculty Salary Costs of State-Related and State-Owned Universities
- Intermediate Units
- The Kilbuck Township (Allegheny County) Landslide
- Medical Professional Liability
- Methadone Use and Abuse
- Minority Representation in the Jury Selection Process
- Part-Time Faculty at Institutions of Higher Education
- Powers of Attorney
- Primary Election Dates
- Public Health
- The Public Library Code
- School Nurses
- Statewide Retirement Systems: Funding and Benefit Structure
- Stroke Prevention and Treatment
- Student Drug and Alcohol Violations: Parental Notification and Access to Student Records
- Tobacco Settlement Funding
- The Vehicle Code
- Violent Interactive Video Games
- Waste Tire Recycling and Reuse

Current Commission projects involve the following:² administrative law, alternative dispute resolution, capital punishment, child abuse and neglect prevention, childhood obesity, constables, decedents' estates, the emergency medical services system, the long-term care services and support delivery system, mental health treatment of inmates and others, public health, real property, and violence prevention.

Each member of the General Assembly is a member of the Commission. However, a 14-member Executive Committee comprised of the leadership of both the House of Representatives and the Senate oversees the Commission.³ In addition, Representative Florindo J. Fabrizio and Senator John C. Rafferty, Jr., serve as the Chair and Vice-Chair of the Commission. The release of a report by the Commission does not necessarily reflect the endorsement by the members of the Executive Committee, or the Chair and Vice-Chair, of all the findings, recommendations or conclusions contained in the report.

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² Not included in this list are “completed” projects in which a report has been published but subsequent action on the part of the Commission is required (*e.g.*, drafting legislation and statutory amendments, updating research, tracking legislation through the legislative process, attending hearings, and answering questions from legislators, legislative staff, interest groups and constituents).

³ The Executive Committee consists of seven members of the House of Representatives (the Speaker, Majority Leader, Minority Leader, Majority Whip, Minority Whip, Majority Caucus Chair, and Minority Caucus Chair) and seven members of the Senate (the President Pro Tempore, Majority Leader, Minority Leader, Majority Whip, Minority Whip, Majority Caucus Chair, and Minority Caucus Chair).

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INTRODUCTION

Since its creation in 1945, the Joint State Government Commission's Advisory Committee on Decedents' Estates Laws has contributed greatly to improving the law in Pennsylvania by recommending legislation concerning decedents' estates and the Probate, Estates and Fiduciaries (PEF) Code.⁴ This report summarizes the work of the Advisory Committee during the past 68 years, from the streamlining and modernization of the Seven Sisters Act⁵ to the codification of existing decedents' estates laws into Title 20 of the Pennsylvania Consolidated Statutes and the subsequent amendment of that title to accommodate new and updated statutory provisions.

This report first recounts the purpose of 1945 Senate Resolution No. 46, which authorized the Joint State Government Commission to form a legislative task force and advisory committee to review decedents' estates laws. The section titled *The Task Force and Advisory Committee on Decedents' Estates Laws* also discusses the membership and leadership of the Task Force and Advisory Committee and outlines the process used to develop statutory recommendations. Finally, that section summarizes the projects of the Advisory Committee from 1945 to 1972, the codification of the PEF Code (including the original chapter organization of the PEF Code), and proposed legislation since 1972.

The next section, *Advisory Committee Reports*, lists all 43 published reports of the Advisory Committee since its creation. Numerous reports published after the 1972 codification contain proposed omnibus amendments to the PEF Code and, in some instances, to other titles of the Pennsylvania Consolidated Statutes. Other reports focus on one particular topic, such as guardianships, powers of attorney, or trusts.

The list of Advisory Committee reports is followed by *Proposed Legislation Organized by Advisory Committee Report*. This section details the contents of each report and provides the specific section and subsection that is the subject of the proposed amendment or repeal or that is newly proposed. The reports are listed in reverse chronological order.

⁴ Title 20 of the Pennsylvania Consolidated Statutes (20 Pa.C.S.). The PEF Code was codified by the act of June 30, 1972 (P.L.508, No.164) and effective July 1, 1972.

⁵ The Orphan's Court Partition Act, the Orphans' Court Act, the Revised Price Act, the Wills Act, the Register of Wills Act, the Intestate Act, and the Fiduciaries Act.

The next section, *Proposed Legislation Organized by Statutory Section*, comprehensively lists each specific section and subsection to which the Advisory Committee has made a recommendation. It then summarizes the nature of the recommendation (proposed amendment, repeal or addition) and the report containing the recommendation. Of note is that, in a number of instances, the Advisory Committee has revisited the same provision over the years, and several reports capture the multiple or recurring recommendations.

The section that then follows is *Proposed Legislation Organized by Legislative Session*. Listed here are each bill introduced that is based on the recommendations of the Advisory Committee, along with the relevant provisions included in the bill and a summary of the disposition of the bill. If the bill was enacted, the act number and enactment date is provided. In two instances, a bill containing the Advisory Committee's recommendations was vetoed by the Governor, despite having passed both chambers of the General Assembly unanimously.⁶ In the case of a veto, the date of passage in each chamber is provided, along with the veto number and date of the veto.

The next section of this report provides a detailed table of contents for the PEF Code, as it was enacted in 1972.

Finally, this report contains a list of the Advisory Committee Chairs and Advisory Committee members, with dates of service and county of practice.

⁶ One bill, 1989 Senate Bill No. 775, was amended in the House, and the Senate concurred in the House amendments by a vote of 47-2.

THE TASK FORCE AND ADVISORY COMMITTEE ON DECEDENTS' ESTATES LAWS

Authorization, Membership and Process

Senate Resolution No. 46 of 1945 authorized the Joint State Government Commission to form a legislative task force and an advisory committee to review the laws regarding decedents' estates and recommend amendments to the General Assembly to streamline and modernize Pennsylvania law. At the time, no revision of Pennsylvania's decedents' estates laws had been made for nearly 30 years, "but numberless amendments have been made and laws on subjects related thereto have been enacted, which render the true status of these laws uncertain and difficult of administration." Under the resolution, the Commission was specifically directed:

to study, revise and prepare for re-enactment, the Orphans' Court Partition Act, the Orphans' Court Act, the Revised Price Act, the Wills Act, the Register of Wills Act, the Intestate Act and the Fiduciaries Act, together with all of their supplements and amendments and all separate laws that should properly be incorporated therein. . .

The established Task Force on Decedents' Estates is a bipartisan and bicameral group of legislators. Senator Stewart J. Greenleaf currently serves as the Chair of the Task Force and has served in that capacity since his appointment on January 4, 1985. Current Task Force members include Senator Patrick M. Browne, Senator Jay Costa, Representative Michael K. Hanna, Representative C. Adam Harris, and Senator Michael J. Stack.

The Advisory Committee on Decedents' Estates is a standing group of attorneys and judges from across the Commonwealth. Since 1945, the Advisory Committee has provided expertise and advice in formulating legislation aimed at improving the law in the Commonwealth, most recently regarding the PEF Code and related statutes. William Campbell Ries, Esquire, and C. Thomas Work, Esquire, currently serve as the Chair and Vice Chair of the Advisory Committee.

Before William Campbell Ries became Chair of the Advisory Committee in 2013, only six other individuals served in that capacity:

Former Chairs of the Advisory Committee on Decedents' Estates Laws	
Service	Chair
1945-1957	Robert Brigham, Esquire
1958-1973	The Honorable Mark E. Lefever
1973-1981	William H. Eckert, Esquire
1981-1993	George J. Hauptfuhrer, Esquire
1993-2001	William McC. Houston, Esquire
2001-2013	Edward M. Watters, Esquire

Since the creation of the Advisory Committee in 1945, more than 110 individuals have served as members. The Advisory Committee currently consists of 34 members, including the Chair and Vice Chair, with six members having experience as appellate or Orphans' Court judges. Advisory Committee members volunteer their time and are not compensated for their service to the General Assembly and the Commission.

The Advisory Committee generally meets on an annual basis, with established subcommittees meeting throughout the year to consider discrete areas of the law and report to the Advisory Committee as a whole. After reaching consensus⁷ on proposed legislation, the Advisory Committee presents to the Task Force a draft report containing the legislation and any comments to the legislation, developed by the Joint State Government Commission and the Advisory Committee. Such comments become the official comments to the legislation, which may be used in determining the intent of the General Assembly.⁸

Ultimately, the Task Force authorizes the publication of the report, and the legislation is finalized for introduction. However, the authorization to publish a report and prepare the legislation for introduction does not necessarily reflect the endorsement of the recommendations by the Task Force.

Most recently, the Advisory Committee has published reports containing statutory recommendations regarding such topics as guardianships, powers of attorney, trusts, health care decision-making, principal and income, the prudent investor rule, charitable instruments, powers of appointment, and the release of powers and interests and disclaimer of powers.

⁷ Consensus does not necessarily reflect unanimity among the Advisory Committee members on each individual legislative recommendation. However, it does reflect the views of a substantial majority of the Advisory Committee, gained after lengthy consideration and deliberation.

⁸ 1 Pa.C.S. § 1939 (“The comments or report of the commission . . . which drafted a statute may be consulted in the construction or application of the original provisions of the statute if such comments or report were published or otherwise generally available prior to the consideration of the statute by the General Assembly . . .”).

Advisory Committee Projects from 1945 to 1972

Following its formation in 1945, the Advisory Committee reviewed many areas of the law concerning decedents' estates and crafted legislation that resulted in the enactment of, among other things, the following:

- Intestate Act of 1947⁹
- Wills Act of 1947¹⁰
- Estates Act of 1947¹¹
- Principal and Income Act of 1947¹²
- Fiduciaries Act of 1949¹³
- Fiduciaries Investment Act of 1949¹⁴
- Incompetents' Estates Act of 1951¹⁵
- Register of Wills Act of 1951¹⁶
- Orphans' Court Act of 1951¹⁷
- Estate Tax Apportionment Act of 1951¹⁸
- Inheritance and Estate Tax Act of 1961¹⁹
- Adoption Act²⁰

Prior to or concurrent with the introduction of the foregoing legislation based on the Advisory Committee's recommendations, the Joint State Government Commission published a report containing the proposed statutory provisions, along with an explanation of how the proposed statutory provisions would improve the law in the Commonwealth and comments that reveal background information and guide how specific provisions should be interpreted.²¹

⁹ Act of April 24, 1947 (P.L.80, No.37).

¹⁰ Act of April 24, 1947 (P.L.89, No.38).

¹¹ Act of April 24, 1947 (P.L.100, No.39).

¹² Act of July 3, 1947 (P.L.1283, No.516).

¹³ Act of April 18, 1949 (P.L.512, No.121).

¹⁴ Act of May 26, 1949 (P.L.1828, No.544).

¹⁵ Act of June 28, 1951 (P.L.612, No.158).

¹⁶ Act of June 28, 1951 (P.L.638, No.159).

¹⁷ Act of August 10, 1951 (P.L.1163, No.263).

¹⁸ Act of August 24, 1951 (P.L.1405, No.338).

¹⁹ Act of June 15, 1961 (P.L.373, No.207).

²⁰ Act of July 24, 1970 (P.L.620, No.208).

²¹ A summary of the contents of these reports is set forth *infra* pp. 123-137.

***Codification of Title 20 of the
Pennsylvania Consolidated Statutes***

The Advisory Committee's project of greatest scope involved the codification of existing decedents' estates laws into Title 20 of the Pennsylvania Consolidated Statutes. The development of the PEF Code followed a thorough review and discussion of existing Pennsylvania law and the Uniform Probate Code (UPC), which was approved in 1969 (but since revised) by the National Conference of Commissioners on Uniform State Laws. It is noteworthy that "[i]n preparing the UPC, the National Conference recognized many of Pennsylvania's estate administration laws as state of the art and incorporated them into the UPC. For example, the UPC embraced the Pennsylvania approach of providing alternatives to formal administration and reducing judicial intervention in routine administrative matters."²²

However, the Advisory Committee did not adopt the UPC as promulgated; rather, it "acknowledged the advantages in retaining existing Pennsylvania statutory language in preference to introducing the unfamiliar terminology and concepts contained in the UPC and decided to use the occasion to reorganize and restate Pennsylvania's probate law."²³

The codification of the PEF Code incorporated, among other things, existing law under the Estates Act of 1947, the Estate Tax Apportionment Act of 1951, the Fiduciaries Act of 1949, the Fiduciaries Investment Act of 1949, the Incompetents' Estates Act of 1951, the Intestate Act of 1947, the Orphans' Court Act of 1951, the Pennsylvania Uniform Gifts to Minors Act,²⁴ the Principal and Income Act of 1947, the Register of Wills Act of 1951, the Revised Price Act of 1917,²⁵ the Simultaneous Death Act,²⁶ the Slayers Act,²⁷ the Uniform Anatomical Gift Act,²⁸ and the Wills Act of 1947.

In 1972, the PEF Code was organized into the following chapters in Title 20:²⁹

Chapter	Chapter Heading
1	Short Title and Definitions
3	Ownership of Property; Legal Title and Equitable Estate
7	Orphans' Court Divisions
9	Register of Wills

²² *The Task Force and Advisory Committee on Decedents' Estates Laws -- Commemorating Fifty Years of Service to the Commonwealth, 1945-1995*, at 9 (J. State Gov't Comm'n, Nov. 1995).

²³ *Id.*

²⁴ Act of June 21, 1957 (P.L.358, No.199).

²⁵ Act of June 7, 1917 (P.L.388, No.189).

²⁶ Act of June 19, 1941 (P.L.138, No.75).

²⁷ Act of August 5, 1941 (P.L.816, No.301).

²⁸ Act of December 16, 1969 (P.L.366, No.161).

²⁹ The complete organizational structure of the PEF Code, as enacted in 1972, appears *infra* pp. 255-273.

Chapter	Chapter Heading
21	Intestate Succession
25	Wills
31	Dispositions Independent of Letters; Family Exemption; Probate of Wills and Grant of Letters
33	Administration and Personal Representatives
35	Accounts and Distribution
37	Estate Tax Apportionment
41	Foreign Fiduciaries
45	Sureties
51	Minors
53	Pennsylvania Uniform Gifts to Minors Act
55	Incompetents
57	Absentees and Presumed Decedents
61	Estates
71	Trust Estates
73	Fiduciaries Investments
81	Principal and Income
82	Revised Price Act
84	Military Service
85	Simultaneous Death
86	Anatomical Gifts
87	Employee Benefits
88	Slayers

Proposed Legislation Since 1972

Since the codification of Title 20 of the Pennsylvania Consolidated Statutes, the Advisory Committee has continued to review statutory law, case law, rules and regulations, uniform acts, Federal law, and the laws of other states. Over the years, it has recommended numerous amendments to the PEF Code, as well as to the Associations Code,³⁰ the Crimes Code,³¹ the Domestic Relations Code,³² the title regarding taxation and fiscal affairs,³³ and unconsolidated statutes, as those provisions related to 20 Pa.C.S.

³⁰ Title 15 of the Pennsylvania Consolidated Statutes (15 Pa.C.S.).

³¹ Title 18 of the Pennsylvania Consolidated Statutes (18 Pa.C.S.).

³² Title 23 of the Pennsylvania Consolidated Statutes (23 Pa.C.S.).

³³ Title 72 of the Pennsylvania Consolidated Statutes (72 Pa.C.S.). Chapter 17 (Subchapters A-L) of 72 Pa.C.S. (the Inheritance and Estate Tax Act) was added by the act of December 13, 1982 (P.L.1086, No.255) and repealed by the act of August 4, 1991 (P.L.97, No. 22). The repealed provisions are now contained in Article XXI of the act of March 4, 1971 (P.L.6, No.2), known as the Tax Reform Act of 1971.

The Advisory Committee's PEF Code recommendations have included, among many other things, the addition or amendment of provisions regarding the following:

- The elective share of a surviving spouse³⁴
- Wills³⁵
- Contractual arrangements relating to succession³⁶
- Formula clauses for Federal tax purposes³⁷
- Dispositions independent of letters, family exemption, probate of wills, and grant of letters³⁸
- Administration and personal representatives³⁹
- The apportionment of death taxes⁴⁰
- Temporary fiduciaries⁴¹
- The Pennsylvania Uniform Transfers to Minors Act⁴²
- Health care⁴³
- Incapacitated persons⁴⁴
- Powers of attorney⁴⁵
- The release of powers and interests and disclaimer of powers⁴⁶
- The rule against perpetuities⁴⁷
- Death during divorce proceedings, where no divorce decree has been entered but grounds for divorce have been established⁴⁸
- Disclaimers⁴⁹
- The Prudent Investor Rule⁵⁰
- Municipalities investments⁵¹
- Limitations on the exercise of trustee powers and powers of beneficiaries to appoint trustees⁵²
- Powers of appointment⁵³

³⁴ 20 Pa.C.S. ch. 22.

³⁵ 20 Pa.C.S. ch. 25.

³⁶ 20 Pa.C.S. ch. 27.

³⁷ 20 Pa.C.S. ch. 28.

³⁸ 20 Pa.C.S. ch. 31.

³⁹ 20 Pa.C.S. ch. 33.

⁴⁰ 20 Pa.C.S. ch. 37.

⁴¹ 20 Pa.C.S. ch. 43.

⁴² 20 Pa.C.S. ch. 53.

⁴³ 20 Pa.C.S. ch. 54.

⁴⁴ 20 Pa.C.S. ch. 55.

⁴⁵ 20 Pa.C.S. ch. 56.

⁴⁶ 20 Pa.C.S. § 6103. *Also see* proposed 20 Pa.C.S. § 6103.1 under 2011 Senate Bill No. 96 and 2013 Senate Bill No. 621.

⁴⁷ 20 Pa.C.S. §§ 6104, 6105, 6106, 6107 & 6107.1.

⁴⁸ 20 Pa.C.S. §§ 2106, 2507, 6111.2 & 6111.2.

⁴⁹ 20 Pa.C.S. ch. 62.

⁵⁰ 20 Pa.C.S. ch. 72.

⁵¹ 20 Pa.C.S. ch. 73.

⁵² 20 Pa.C.S. ch. 75.

⁵³ Proposed 20 Pa.C.S. ch. 76 under 2011 Senate Bill No. 96 and 2013 Senate Bill No. 621.

- The Uniform Trust Act⁵⁴
- Charitable instruments⁵⁵
- The Pennsylvania Uniform Principal and Income Act⁵⁶
- Anatomical gifts⁵⁷

Because of the many issues that continue to arise concerning the PEF Code, the Advisory Committee continually monitors statutory law, case law, Orphans' Court rules, Pennsylvania practices and procedures, the promulgation and enactment of uniform laws, other states' laws, and applicable federal law. Members of the Advisory Committee consult with various entities, including the Pennsylvania Bankers Association and the Pennsylvania Bar Association, to develop statutory recommendations with the goal of clarifying, modernizing, and otherwise improving the law in the Commonwealth.

⁵⁴ 20 Pa.C.S. ch. 77, subchs. A-I.

⁵⁵ Proposed 20 Pa.C.S. ch. 79 under 2011 Senate Bill No. 96 and 2013 Senate Bill No. 621.

⁵⁶ 20 Pa.C.S. ch. 81.

⁵⁷ 20 Pa.C.S. ch. 86.

ADVISORY COMMITTEE REPORTS

The following is a list of the previous reports of the Advisory Committee on Decedents' Estates Laws since the formation of the group in 1945.

Included in this list are several reports to which various members of the Advisory Committee contributed, and although these reports are not the work product of the Advisory Committee itself, the Advisory Committee did review and discuss the contents of these reports. These reports include *Guardianship Law in Pennsylvania* (May 2007) and *The Proposed Assisted Reproductive Technologies Act* (May 2007 and May 2008).

In addition, this list includes the following report of the Advisory Committee's Subcommittee on Persons Under Disability: *Guardianship of the Mentally Retarded: A Subcommittee Report on House Bill 1516 to the Judiciary Committee of the House of Representatives* (September 1974).

Finally, this list also includes the following staff reports: *Proposed Health Care Decision-Making Provisions Under Chapter 54 of Title 20 of the Pennsylvania Consolidated Statutes* (February 2002) and *Proposed Revision of Adoption Law and Codification into Pennsylvania Consolidated Statutes, Title 23, Part III -- Incorporating Policy Changes Contained in 1979 House Bill 213, Printer's No. 1741* (May 1980).

Year	Report
2012	<i>Guardianship Law: Proposed Amendments to the Probate, Estates and Fiduciaries Code</i> (Report of the Advisory Committee on Decedents' Estates Laws, October 2012)
2011	<i>Powers of Attorney and Healthcare Decision-Making: Proposed Amendments to the Probate, Estates, and Fiduciaries Code</i> (Report of the Advisory Committee on Decedents' Estates Laws, June 2011)
2010	<i>The Probate, Estates and Fiduciaries Code: Proposed Amendments to Title 20 of the Pennsylvania Consolidated Statutes</i> (Report of the Advisory Committee on Decedents' Estates Laws, June 2010)
	<i>Powers of Attorney: Proposed Amendments to the Probate, Estates, and Fiduciaries Code</i> (Report of the Advisory Committee on Decedents' Estates Laws, March 2010)
2008	<i>The Proposed Assisted Reproductive Technologies Act</i> (Report of the Subcommittee on Assisted Reproductive Technologies, May 2008)

Year	Report
2007	<i>Probate, Estates, and Fiduciary Code: Proposed Amendments to Title 20 of the Pennsylvania Consolidated Statutes</i> (Report of the Advisory Committee on Decedents' Estates Laws, October 2007)
	<i>Guardianship Law in Pennsylvania</i> (Report of the Working Group on Guardianships, May 2007)
	<i>The Proposed Assisted Reproductive Technologies Act</i> (Report of the Subcommittee on Assisted Reproductive Technologies, May 2007)
2005	<i>The Proposed Pennsylvania Uniform Trust Act and Amendments to the Probate, Estates and Fiduciaries Code</i> (Report of the Advisory Committee on Decedents' Estates Laws, April 2005)
2003	<i>The Proposed Pennsylvania Uniform Trust Act and Amendments to the Probate, Estates and Fiduciaries Code</i> (Report of the Advisory Committee on Decedents' Estates Laws, November 2003)
2002	<i>Proposed Health Care Decision-Making Provisions Under Chapter 54 of Title 20 of the Pennsylvania Consolidated Statutes: 2002 Senate Bill 1265 (Printer's No. 1682)</i> (Staff Report of the Joint State Government Commission, February 2002)
2001	<i>Proposed Pennsylvania Uniform Principal and Income Act and Other Proposed Amendments</i> (Report of the Advisory Committee on Decedents' Estates Laws, June 2001)
1998	<i>Powers of Attorney: Recommended Amendments</i> (Report of the Subcommittee on Guardianships and Powers of Attorney of the Task Force and Advisory Committee on Decedents' Estates Laws, November 1998)
	<i>A Health Care Decision-Making Proposal; A Prudent Investor Rule; [and] Other Proposed Amendments -- Recommended by the Task Force and Advisory Committee on Decedents' Estates Law</i> (March 1998)
1996	<i>Report of the Subcommittee on Guardianships and Powers of Attorney of the Task Force and Advisory Committee on Decedents' Estates Laws: Recommending Amendments to Chapter 55 (Incapacitated Persons) of the Probate, Estates and Fiduciaries Code</i> (May 1996)
1994	<i>1994 Report of the Task Force and Advisory Committee on Decedents' Estates Laws: Recommending a Health Care Power of Attorney Statute [and] Other Amendments to the Probate, Estates and Fiduciaries Code</i> (April 1994)
1991	<i>1991 Report of the Joint State Government Commission Task Force and Advisory Committee on Decedents' Estates Laws -- Containing Recommendations Amending the Probate, Estates and Fiduciaries Code and the Inheritance and Estate Tax Act with Comments</i> (June 1991)
1988	<i>Exempting Spousal Transfers and Other Proposed Amendments to the Inheritance and Estate Tax Act [and the] Probate, Estates and Fiduciaries Code: Proposed Amendments and Comments</i> (February 1988)

Year	Report
1985	<i>Probate, Estates and Fiduciaries Code: Proposed Amendments and Comments -- 1985 (October 1985)</i>
1984	<i>Report of the Subcommittee on Guardianships [of the] Joint State Government Commission Task Force and Advisory Committee on Decedents' Estates Laws (March 1984)</i>
1983	<i>Probate, Estates and Fiduciaries Code: Proposed Amendments and Comments -- 1983 (October 1983)</i>
1981	<i>Probate, Estates and Fiduciaries Code (Proposed Amendments and Comments -- 1981) and Proposed Revision of Inheritance Tax Laws and Codification of Chapter 17, Title 72 of Pennsylvania Consolidated Statutes (March 1981)</i>
1980	<i>Proposed Revision of Adoption Law and Codification into Pennsylvania Consolidated Statutes, Title 23, Part III -- Incorporating Policy Changes Contained in 1979 House Bill 213, Printer's No. 1741: (Staff Report of the Joint State Government Commission, May 1980)</i>
1979	<i>Probate, Estates and Fiduciaries Code: Proposed Amendments and Comments -- 1979 (Including a Study of the Impact of Inheritance Taxes on Decedents' Domicile) (May 1979)</i>
1977	<i>Probate, Estates and Fiduciaries Code: Proposed Amendments and Comments -- 1977 (June 1977)</i>
1975	<i>Probate, Estates and Fiduciaries Code: Proposed Amendments and Comments -- 1975 (November 1975)</i>
1974	<i>Guardianship of the Mentally Retarded: A Subcommittee Report on House Bill 1516 to the Judiciary Committee of the House of Representatives (September 1974)</i>
1973	<i>Proposed Amendments: Probate, Estates and Fiduciaries Code -- Phase II (May 1973)</i>
1972	<i>Proposed Probate, Estates and Fiduciaries Code (January 1972)</i>
1970	<i>Proposed Adoption Act (1970)</i>
1963	<i>Inheritance and Estate Tax of 1961, As Amended (1963)</i>
1959	<i>Proposed Inheritance and Estate Tax Act of 1959: Second Report of the Task Force on Decedents' Estates Laws (1959)</i>
1958	<i>Proposed Inheritance and Estate Tax Act of 1959: A Report of the Task Force on Decedents' Estates Laws (June 1958)</i>
1955	<i>Proposed Amendments to the Decedents' Estates Laws: Report of the Subcommittee on Decedents' Estates Laws of the Joint State Government Commission of the General Assembly of the Commonwealth of Pennsylvania (July 1955)</i>

Year	Report
1951	<i>Report of the Joint State Government Commission of the General Assembly of the Commonwealth of Pennsylvania Relating to the Following Decedents' Estates Laws of 1951: Incompetents' Estates Act of 1951, Register of Wills Act of 1951, Orphans' Court Act of 1951 [and] Estate Tax Apportionment Act of 1951 (1951)</i>
1950	<i>Proposed Incompetents' Estates Act of 1951: Report of the Subcommittee on Decedents' Estates Laws of the Joint State Government Commission of the General Assembly of the Commonwealth of Pennsylvania (November 1950)</i>
	<i>Proposed Register of Wills Act of 1951: Report of the Subcommittee on Decedents' Estates Laws of the Joint State Government Commission of the General Assembly of the Commonwealth of Pennsylvania (July 10, 1950)</i>
	<i>Proposed Orphans' Court Act of 1951: Report of the Subcommittee on Decedents' Estates Laws of the Joint State Government Commission of the General Assembly of the Commonwealth of Pennsylvania (May 10, 1950)</i>
1949	<i>Report of the Joint State Government Commission of the General Assembly of the Commonwealth of Pennsylvania Relating to the Following Decedents' Estates Laws: Fiduciaries Act of 1949 [and] Fiduciaries Investment Act of 1949 (1949)</i>
	<i>Proposed Fiduciaries Investment Act of 1949: Report of the Committee on Decedents' Estates Laws of the Joint State Government Commission of the General Assembly of the Commonwealth of Pennsylvania (January 3, 1949)</i>
1947	<i>Report of the Joint State Government Commission of the General Assembly of Pennsylvania Relating to the Following Decedents' Estates Laws: Intestate Act of 1947, Wills Act of 1947, Estates Act of 1947 [and] Principal and Income Act of 1947 (1947)</i>
1946	<i>Proposed Wills Act of 1947: Report of the Committee on Decedents' Estates Laws of the Joint State Government Commission (June 1, 1946)</i>
	<i>Proposed Intestate Act of 1947: Report of the Committee on Decedents' Estates Laws of the Joint State Government Commission (March 15, 1946)</i>

The Joint State Government Commission also published a commemorative book that provided a history of the Task Force and Advisory Committee: *The Task Force and Advisory Committee on Decedents' Estates Laws -- Commemorating Fifty Years of Service to the Commonwealth, 1945-1995* (November 1995).

PROPOSED LEGISLATION ORGANIZED BY ADVISORY COMMITTEE REPORT

The following tables summarize the contents of each report of the Advisory Committee on Decedents' Estates Laws since the 1972 enactment of the PEF Code. The tables include the section and subsection of each statutory provision addressed in the specific report,⁵⁸ along with the recommendation of the Advisory Committee regarding the statutory provision. A recommendation may be the amendment or repeal of an existing statutory provision or the addition of a new provision.

October 2012 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
751	Appointment; purpose			Amendment
752	Compensation			Amendment
5503	Venue			New
		(a)	Applicability	New
		(b)	Guardian of person	New
		(c)	Guardian of estate	New
		(d)	Multiple judicial districts	New
5504	Confidentiality and disclosure of information			New
5511	Petition and hearing; independent evaluation			
		(a)	Resident	Repeal
		(a.1)	Resident	New
		(a.2)	Appointment of counsel	New
		(f)	Who may be appointed guardian	Amendment (rewritten)
		(g)	Who may not be appointed guardian	New
		(h)	Preference in appointing guardian of person	New

⁵⁸ Primarily, the reports address the PEF Code. However, the reports may also contain recommendations regarding the Associations Code (Title 15 of the Pennsylvania Consolidated Statutes; 15 Pa.C.S.), the Crimes Code (Title 18 of the Pennsylvania Consolidated Statutes; 18 Pa.C.S.), the Domestic Relations Code (Title 23 of the Pennsylvania Consolidated Statutes; 23 Pa.C.S.), and unconsolidated statutes. In addition, reports may contain recommendations regarding Title 72 of the Pennsylvania Consolidated Statutes (Taxation and Fiscal Affairs), but *see* note 33.

October 2012 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(i)	Preference in appointing guardian of estate	New
5512	County of appointment; qualifications			Repeal
		(a)	Resident incapacitated person	Repeal
		(b)	Nonresident incapacitated person	Repeal
		(c)	Exclusiveness of appointment	Repeal
5512.2	Review hearing			
		(a)	Time of hearing	Amendment
		(c)	Independent evaluation	New
5512.4	Affidavit in uncontested termination matters			New
5512.5	Counsel			New
5513	Emergency guardian			Repeal
		(a)	Appointment	New
		(b)	Procedures and powers generally	New
		(c)	Duration of initial order	New
		(d)	Appointment of counsel	New
		(e)	Extension of order	New
5515	Provisions similar to other estates			Repeal
5515.1	Removal and discharge of guardian			New
		(a)	Conditions	New
		(b)	Procedure	New
		(c)	Discharge of guardian and surety	New
5515.2	Appointment of guardian in conveyance			New
5515.3	Bond	(a)	General rule	New
		(b)	Exceptions	New
		(c)	Court discretion	New
		(d)	Amount	New
5518	Evidence of incapacity			Amendment
5518.1	Cross-examination of witnesses			Amendment
5521	Provisions concerning powers, duties and liabilities			
		(a.1)	Death or removal of guardian	New

October 2012 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Duty of guardian of the estate	Repeal
		(b.1)	Powers of guardian of the estate without further court approval	New
		(b.2)	Powers of guardian of the estate with further court approval	New
		(b.3)	Revival of judgment	New
		(b.4)	Death or incapacity of guardian of estate	New
		(b.5)	Surviving or remaining guardians	New
		(b.6)	Disagreement of guardians of the estate	New
		(b.7)	Filing of decree	New
		(b.8)	Inadequacy of consideration	New
		(b.9)	Substitution of party	New
		(b.10)	Specific performance of contracts	New
		(b.11)	Abandonment of property	New
		(b.12)	Title of purchaser	New
		(b.13)	Compromise or settlement	New
		(c)	Reports	Amendment
		(c.1)	Records of guardian	New
		(g)	Criminal and civil liability	Amendment
		(h)	Liability of guardian of estate	New
		(i)	Delegation by guardian of estate	New
		(j)	Inventory	New
5526	Protection of person dealing with guardian			New
		(a)	Third party liability	New
		(b)	Third party immunity	New
		(c)	Information regarding guardianship	New
5531	When accounting filed			Amendment
5536	Distributions of income and principal during incapacity			
		(a)	In general	Amendment
		(b)	Estate plan	Amendment
		(c)	Petition and notice	New
5553	Guardianship services			
		(a)	In general	Amendment

June 2011 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5511	Petition and hearing; independent evaluation			
		(e)	Petition and contents	Amendment
5521	Provisions concerning powers, duties and liabilities			
		(d.1)	Health care decisions	New
5601	General provisions			
		(b)	Execution	Amendment
		(b.1)	Acknowledgment and affidavits	New
		(e.1)	Limitation on applicability in commercial transaction	Amendment
		(e.2)	Limitation on applicability in health care power of attorney	Amendment
5602	Form of power of attorney			
		(c)	Filing of power of attorney	Amendment
		(d)	Copy of power of attorney	New
5608	Liability			
		(a)	Third party liability	Amendment
		(b)	Third party immunity	Amendment

June 2010 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
2514	Rules of interpretation			Conforming Amendment
Chapter 28	Formula Clauses for Federal Tax Purposes			New
2801	Definitions			New
2802	Interpretation of formula clauses			New
		(a)	General rule	New
		(b)	Exception	New
2803	Judicial proceeding			New
		(a)	Standing	New
		(b)	Commencement	New
		(c)	Considerations	New
		(d)	Modifications	New

June 2010 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(e)	Effective date of interpretation or modification	New
3101	Payments to family and funeral directors			
		(a)	Wages, salary or employee benefits	Amendment
		(b)	Deposit account	Amendment
		(c)	Patient's care account	Amendment
3102	Settlement of small estates on petition			Amendment
3162	Advertisement of grant of letters			Conforming amendment
		(a)	Notice generally	New (restructured)
		(b)	Proofs of advertisement to trustee	New
3163	Submission to jurisdiction			New
3314	Continuation of business			Amendment
3315	Incorporation of estate's business			Amendment
3546	Determination of title to decedent's interest in real estate			Amendment (rewritten)
		(a)	Applicability	New
		(b)	Who may petition	New
		(c)	Where to petition	New
		(d)	Notice of petition	New
		(e)	Decree	New
5603	Implementation of power of attorney			
		(e)	Power to disclaim any interest in property	Conforming amendment
6103	Release or disclaimer of powers or interests			Repeal
		(a)	Powers and interests releasable	Repeal
		(b)	Form of release or disclaimer	Repeal
		(c)	Delivery of release or disclaimer	Repeal
		(d)	Grantee or lienholder	Repeal
6103.1	Release of powers and interests and disclaimer of powers			New

June 2010 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(a)	Interests releasable	New
		(b)	Effect of release of interest	New
		(c)	Nonfiduciary powers disclaimable or releasable	New
		(d)	Fiduciary powers disclaimable or releasable	New
		(e)	Terms of disclaimer or release	New
		(f)	Date of effect	New
		(g)	Procedural requirements	New
Chapter 76	Powers of Appointment			New
7601	Definitions			New
7602	Exercise of powers of appointment			New
		(a)	Broad power of appointment	New
		(b)	Limited power of appointment	New
		(c)	Necessity of donee's specific reference to power	New
		(d)	Exercise before testamentary power granted	New
		(e)	Testamentary powers	New
7603	Contract to exercise power			New
		(a)	Contract prohibited	New
		(b)	Actions for recovery	New
		(c)	No limitation on disclaimer or release	New
7604	Manner of appointment			New
		(a)	Outright or in trust	New
		(b)	Exclusive and nonexclusive powers	New
7605	Anti-lapse provision			New
		(a)	General rule	New
		(b)	Lapsed share of residue	New
7606	Partially effective exercise			New
7607	Creditors' rights			New
7710.1	Nonjudicial settlement agreements - UTC 111			
		(c)	Exception	Amendment
7722	Representation of parties in interest in general			
		(a)	Judicial proceeding	Amendment
		(b)	Nonjudicial resolution	Amendment
		(c)	Permissible consideration	Amendment

June 2010 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(d)	Certification of representation	New
7740.7	Division of trusts			
		(b)	With court approval	Amendment
7755	Claims and distribution after settlor's death			
		(c)	No personal representative	Repeal
		(c)	Trustee's duty to advertise	New
7765	Resignation of trustee; filing resignation			
		(a)	Court approval	Repeal
		(b)	Without court approval if authorized by trust instrument	Repeal
		(c)	Without court approval and without authorization in trust instrument	Repeal
		(a.1)	General rule	New
7780.3	Duty to inform and report			
		(k.1)	Nomination by current beneficiary	New
7792	Powers, duties and liabilities identical with personal representatives			Amendment
Chapter 79	Charitable Instruments			New
7901	Short title			New
7902	Definitions			New
7903	Deemed provisions of governing instrument			New
		(a)	Effect of deemed provisions	New
		(b)	Effect of contrary provisions	New
		(c)	Applicability	New
7904	Power to amend governing instrument			New
7905	Court authority			New
7906	Applicability			New
8113	Charitable trusts			
		(f)	Charitable organizations	Conforming amendment

The June 2010 report also recommends the repeal of the act of June 17, 1971 (P.L.181, No.23), known as the Charitable Instruments Act of 1971.

March 2010 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5422	Definitions			Amendment
5456	Authority of health care agent			
		(a)	Extent of authority	Amendment
5460	Relation of health care agent to court-appointed guardian and other agents			
		(a)	Accountability of health care agent	Amendment
5601	General provisions			
		(b)	Execution	Amendment
		(d)	Acknowledgment executed by agent	Amendment
		(e)	Fiduciary relationship	Amendment
		(e.3)	Equity and justice	New
5601.2	Special rules for gifts			
		(a)	General rule	Amendment
		(b)	Limited gifts	Amendment
		(c)	Unlimited gifts	Amendment
		(c.1)	Other actions not requiring court approval	New
		(c.2)	Court-approved gifts and changes to estate plan	New
		(d)	Nature of gifts	Amendment
		(e)	Equity	Repeal
		(g)	Court proceeding	New
5602	Form of power of attorney			
		(a)	Specification of powers	Amendment
		(c)	Filing of power of attorney	Amendment
		(d)	Copy of power of attorney	New
5603	Implementation of power of attorney			
		(a)	Power to make limited gifts	Amendment
		(d)	Power to claim an elective share	Amendment
		(e)	Power to disclaim any interest in property	Amendment
		(h)	Power to authorize admission to medical facility and power to authorize medical procedures	Repeal
		(k)	Power to engage in stock, bond and other securities transactions	Amendment

March 2010 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(p)	Power to engage in insurance transactions	Amendment
		(q)	Power to engage in retirement plan transactions	Amendment
		(u.1)	Power to make anatomical gift	Repeal
		(u.2)	Power to operate a business or entity	New
		(u.3)	Power to provide for personal and family maintenance	New
5604	Durable powers of attorney			
		(c)	Relation of agent to court-appointed guardian	Amendment
		(d.1)	Disclosure	New
5610	Account			Amendment
5612	Investigation of financial abuse and mismanagement			New
5613	Jurisdiction and venue			New
		(a)	County having venue	New
		(b)	Declining jurisdiction	New
5614	Principles of law and equity			New

May 2008 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
711	Mandatory exercise of jurisdiction through orphans' court division in general			Conforming Amendment
713	Special provisions for Philadelphia County			Conforming Amendment

May 2008 Report				
23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
Chapter 59	Assisted Reproductive Technologies			New
5901	Short title of chapter			New
5902	Definitions			New
5903	Donors			New
		(a)	General rule	New

May 2008 Report

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Donor with intent to become parent	New
5904	Determination of legal parentage generally			New
		(a)	Exclusivity	New
		(b)	Court jurisdiction	New
5905	Gestational agreements generally			New
		(a)	Parties to agreement	New
		(b)	Writing required	New
		(c)	Permissible provisions in agreement	New
		(d)	Health decision making by gestational carrier	New
		(e)	Enforcement of gestational agreement	New
		(f)	Genetic testing	New
		(g)	Fraud and duress	New
5911	Applicability			New
5912	Venue			New
5913	Execution of gestational agreement			New
		(a)	Timing	New
		(b)	Notarization	New
5914	Mandatory contents of gestational agreement			New
5915	Terminating gestational agreement and vacating decree			New
		(a)	Circumstances under which termination of agreement permitted	New
		(b)	Notice if decree not issued	New
		(c)	Notice if decree issued	New
		(d)	Liability	New
5916	Establishing legal parentage through validation of gestational agreement			New
		(a)	Applicability	New
		(b)	General rules	New
		(c)	Contents of petition	New
		(d)	Hearing to consider petition; notice	New
		(e)	Validation decree	New
		(f)	Postbirth notice	New

May 2008 Report

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(g)	Postbirth decree	New
5921	Applicability			New
5922	Venue			New
5923	Execution of gestational agreement			New
		(a)	Timing	New
		(b)	Intent	New
5924	Petition to ratify agreement			New
		(a)	General rule	New
		(b)	Contents of petition	New
		(c)	Exhibits	New
		(d)	Instruments	New
5925	Hearing and notice			New
		(a)	Scheduling	New
		(b)	Notice	New
		(c)	Procedures	New
5926	Decree			New
5927	Amended petition unnecessary			New
5931	Applicability			New
5932	Legal parentage			New
		(a)	Legal parentage of man	New
		(b)	Legal parentage of woman	New
5933	Consent to assisted reproduction			New
		(a)	General rule	New
		(b)	Who must consent	New
		(c)	Contents of consent	New
		(d)	Copy of consent	New
		(e)	Failure to sign consent	New
		(f)	Withdrawal of consent	New
5934	Effect of filing complaint for divorce or annulment			New
		(a)	General rule	New
		(b)	Effect of withdrawal of complaint or reconciliation	New
5935	Parental status of deceased individual			New
		(a)	Consent necessary	New
		(b)	Notice and placement requirements	New
5941	Records generally			New
		(a)	Retention and confidentiality	New
		(b)	Penalty for unauthorized disclosure	New

May 2008 Report				
23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5942	Release of information from court records			New

October 2007 Report				
15 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5547	Authority to take and hold trust property			
		(b)	Nondiversion of certain property	Conforming amendment
5548	Investment of trust funds			
		(b)	Use and management	Conforming amendment

October 2007 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
2106	Forfeiture			
		(a)	Spouse's share	Amendment
2507	Modification by circumstances			Amendment
3162	Advertisement of grant of letters			
		(a)	Notice generally	New (restructured)
		(b)	Proofs of advertisement to trustee	New
3706	Enforcement of contribution or exoneration of Federal estate tax			
		(a)	Duty to pay	Amendment
		(b)	Duty of fiduciary	Amendment
		(c)	Suspending distribution	Amendment
		(d)	Court decrees	Amendment
5603	Implementation of power of attorney			
		(p)	Power to engage in insurance transactions	Amendment
		(q)	Power to engage in retirement plan transactions	Amendment

October 2007 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
6107.1	Applicability of rule against perpetuities			
		(b)	Modern rule	Amendment
6111.1	Modification by divorce			Amendment
6111.2	Effect of divorce on designation of beneficiaries			Amendment
7725	Notice of representation			Amendment
7745	Creditor's claim against settlor - UTC 505(a)			Amendment
7754	Actions contesting validity of revocable trusts			
		(d)	Competency of witnesses	New
7755	Claims and distribution after settlor's death			
		(c)	No personal representative	Repeal
			Trustee's duty to advertise	New
7780.3	Duty to inform and report			
		(a)	Duty to respond to requests	Amendment
		(f)	Notice to current beneficiaries	Amendment
		(g)	Change in trusteeship	Amendment
		(i)	Contents of notice	Amendment
		(k)	Notice to settlor's appointee	Amendment
		(l)	Applicability	Amendment
7780.6	Illustrative powers of trustee			
		(a)	Listing	Amendment
7785	Limitation of action against trustee			
		(a)	Imposed by trustee's written reports	Amendment
8105	Power to convert to unitrust			
		(d)	Post conversion	Amendment
		(e)	Discretion of trustee	Amendment
8149	Retirement benefits, individual retirement accounts, deferred compensation, annuities and similar payments			
		(c)	Allocation when internal net income of fund is readily ascertained	Amendment

May 2007 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5503	Transfer of jurisdiction			New
		(a)	Transfer permissible	New
		(b)	Notice to other court	New
		(c)	Guardian appointed in another state	New
5504	Venue			New
		(a)	Guardian of the person	New
		(b)	Guardian of the estate	New
		(d)	Multiple judicial districts	New
5511	Petition and hearing; independent evaluation			
		(a)	Resident	Amendment
		(a.1)	Appointment of counsel	New
		(f)	Who may be appointed guardian	Amendment (rewritten)
		(g)	Who may not be appointed guardian	New
		(h)	Priority in appointing guardian	New
5512	County of appointment; qualifications			Repeal
		(a)	Resident incapacitated person	Repeal
		(b)	Nonresident incapacitated person	Repeal
		(c)	Exclusiveness of appointment	Repeal
5512.2	Review hearing			
		(a)	Time of hearing	Amendment
		(b)	Burden of proof and rights	Amendment
		(c)	Independent evaluation	New
5513	Emergency guardian			Amendment (restructured)
		(a)	Appointment	Amendment
		(b)	Procedures and powers generally	Amendment
		(c)	Duration of initial order	Amendment
		(d)	Appointment of counsel	New
		(e)	Extension of order	New
		(f)	Procedure upon expiration of order	Amendment
5518	Evidence of incapacity			Amendment
5518.1	Cross-examination of witnesses			Amendment

May 2007 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5521	Provisions concerning powers, duties and liabilities			
		(b)	Duty of guardian of the estate	Amendment
		(c)	Reports	Amendment
		(g)	Criminal and civil liability	Amendment
		(h)	Delegation	New
		(i)	Inventory and records	New
5522	Power to lease			Amendment
5526	Protection of person dealing with guardian			New
		(a)	General rule	New
		(b)	Additional protection	New
5531	When accounting filed			Amendment
5536	Distributions of income and principal during incapacity			
		(a)	In general	Amendment
5556	Guardianship support office			New
		(a)	Establishment	New
		(b)	Applicability	New
		(c)	Powers and duties	New
		(d)	Reimbursement	New

May 2007 Report (Assisted Reproductive Technologies)				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
711	Mandatory exercise of jurisdiction through orphans' court division in general			Conforming Amendment
713	Special provisions for Philadelphia County			Conforming Amendment

May 2007 Report (Assisted Reproductive Technologies)				
23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
Chapter 59	Assisted Reproductive Technologies			New
5901	Short title of chapter			New
5902	Definitions			New
5903	Donors			New
		(a)	General rule	New

May 2007 Report (Assisted Reproductive Technologies)

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Donor with intent to become parent	New
5904	Determination of legal parentage generally			New
		(a)	Exclusivity	New
		(b)	Court jurisdiction	New
5905	Gestational agreements generally			New
		(a)	Parties to agreement	New
		(b)	Writing required	New
		(c)	Permissible provisions in agreement	New
		(d)	Health decision making by gestational carrier	New
		(e)	Enforcement of gestational agreement	New
		(f)	Genetic testing	New
		(g)	Fraud and duress	New
5906	Records generally			New
		(a)	Retention and confidentiality	New
		(b)	Penalty for unauthorized disclosure	New
5911	Applicability			New
5912	Venue			New
5913	Execution of gestational agreement			New
		(a)	Timing	New
		(b)	Notarization	New
5914	Mandatory contents of gestational agreement			New
5915	Terminating gestational agreement and vacating decree			New
		(a)	Circumstances under which termination of agreement permitted	New
		(b)	Notice if decree not issued	New
		(c)	Notice if decree issued	New
		(d)	Liability	New
5916	Establishing legal parentage through validation of gestational agreement			New
		(a)	Applicability	New
		(b)	General rules	New
		(c)	Contents of petition	New

May 2007 Report (Assisted Reproductive Technologies)				
23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(d)	Hearing to consider petition; notice	New
		(e)	Validation decree	New
		(f)	Postbirth notice	New
		(g)	Postbirth decree	New
5921	Applicability			New
5922	Venue			New
5923	Execution of gestational agreement			New
		(a)	Timing	New
		(b)	Intent	New
5924	Petition to ratify agreement			New
		(a)	General rule	New
		(b)	Contents of petition	New
		(c)	Exhibits	New
		(d)	Instruments	New
5925	Hearing and notice			New
		(a)	Scheduling	New
		(b)	Notice	New
		(c)	Procedures	New
5926	Decree			New
5927	Amended petition unnecessary			New

April 2005 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
723	Situs of testamentary trust			Repeal
724	Situs of inter vivos trust			Repeal
725	Change of situs; order of court			Repeal
751	Appointment; purpose			Conforming amendment
908	Appeals			
		(a)	When allowed	Amendment
3384.1	Notice after settlor of revocable fund has died			New (Conforming amendment)
3534.1	Cost of distribution of tangible personal property			New
3543	Interest or income on distributive shares			

April 2005 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(a)	Pecuniary legacy	Amendment
		(c)	Demonstrative legacy	Amendment
		(d)	Residuary legacy or devise	Amendment
		(e)	Future date	Amendment
		(f)	Relationship	Amendment
3702	Equitable apportionment of Federal estate tax			
		(h)	Interest and penalties	Amendment
6101	Definitions			Conforming amendment
6102	Termination of trusts			Repeal
		(a)	Failure of original purpose	Repeal
		(b)	Distribution of terminated trust	Repeal
		(c)	Other powers	Repeal
6104	Rule against perpetuities			
		(b)	Void interest; exceptions	Amendment
6106	Income accumulations; when void			
		(b)	Void accumulations; exceptions	Amendment
6110	Administration of charitable interests			Repeal
6112	Spendthrift trusts			Repeal
6114	Rules of interpretation			Conforming amendment
Chapter 71	Trust Estates			Repeal
7201	Definitions			Amendment
7314.1	Mutual funds			Amendment
7503	Application of chapter			
		(b)	Exclusion	Amendment
7504	Certain trustee powers not exercisable			
		(c)	Exceptions	New
7506	Certain powers of beneficiaries not exercisable			
		(a)	General rule	Amendment
		(b)	Exception	Amendment
Chapter 77	Trusts			New
7701	Short title - UTC 101			New
7702	Scope - UTC 102			New
7703	Definitions - UTC 103			New
7704	Knowledge - UTC 104			New
		(a)	When person has knowledge	New
		(b)	Employees	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
7705	Trust instrument controls; mandatory rules - UTC 105			New
		(a)	Trust instrument controls	New
		(b)	Mandatory rules	New
7706	Common law of trusts; principles of equity - UTC 106			New
7707	Governing law - UTC 107			New
7708	Situs of trust			New
		(a)	Specified in trust instrument	New
		(b)	Unspecified in trust instrument	New
		(c)	Transfer	New
		(d)	Notice of transfer	New
		(e)	Consent to transfer	New
		(f)	Successor trustee	New
		(g)	Court-directed change in situs	New
		(h)	Claims not discharged	New
7709	Methods and waiver of notice - UTC 109			New
		(a)	Notice generally	New
		(b)	Unknown identity or location	New
		(c)	Waiver	New
		(d)	Notice of judicial proceeding	New
7710	Notice; others treated as beneficiaries - UTC 110			New
		(a)	Notice	New
		(b)	Enforcement by charitable organization expressly named in instrument	New
		(c)	Enforcement by others	New
		(d)	Office of Attorney General	New
7710.1	Nonjudicial settlement agreements - UTC 111			New
		(a)	(Reserved)	New
		(b)	General rule	New
		(c)	Exception	New
		(d)	Matters that may be resolved	New
		(e)	Request of court	New
7710.2	Rules of construction - UTC 112			New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
7711	Role of court in administration of trust - UTC 201			New
		(a)	Judicial intervention	New
		(b)	Judicial supervision	New
		(c)	Scope of proceeding	New
7712	Jurisdiction over trustee and beneficiary - UTC 202			New
		(a)	Personal jurisdiction over trustee	New
		(b)	Personal jurisdiction over beneficiary	New
		(c)	Additional jurisdictional methods	New
7713	(Reserved)			New
7714	Venue - UTC 204			New
		(a)	General rule	New
		(b)	Exceptions	New
7721	Scope; definition of trust matter			New
		(a)	Scope	New
		(b)	Definition	New
7722	Representation of parties in interest in general			New
		(a)	Judicial proceeding	New
		(b)	Nonjudicial resolution	New
		(c)	Permissible consideration	New
7723	Representatives and persons represented			New
7724	Appointment of representative			New
7725	Notice of representation			New
7726	Representation ineffective if person objects			New
7731	Creation of trust - UTC 401			New
7732	Requirements for creation - UTC 402			New
		(a)	Requirements	New
		(b)	(Reserved)	New
		(b.1)	Signature by mark or another	New
		(c)	Power to select beneficiary from indefinite class	New
		(d)	Definition	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
7733	Written trusts created in other jurisdictions - UTC 403			New
7734	Trust purposes - UTC 404			New
7735	Charitable purposes; enforcement - UTC 405			New
		(a)	Purposes	New
		(b)	Selection by court	New
		(c)	Proceeding to enforce trust	New
7736	Creation of trust induced by fraud, duress or undue influence - UTC 406			New
7737	Oral trusts unenforceable			New
7738	Trust for care of animal - UTC 408			New
		(a)	Creation and termination	New
		(b)	Enforcement	New
		(c)	Limitation	New
7739	Noncharitable trust without ascertainable beneficiary - UTC 409			New
7740	Termination of trusts; proceedings for termination or modification of trusts - UTC 410			New
		(a)	Termination	New
		(b)	Proceedings for termination or modification	New
7740.1	Modification or termination of noncharitable irrevocable trust by consent - UTC 411			New
		(a)	Consent by settlor and beneficiaries	New
		(b)	Consent by beneficiaries with court approval	New
		(b.1)	Spendthrift provision	New
		(c)	Distribution upon termination	New
		(d)	Consent by some beneficiaries with court approval	New
7740.2	Modification or termination of noncharitable irrevocable trust by court - UTC 412			New
		(a)	Unanticipated circumstances	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Inability to administer effectively	New
		(c)	Distribution of property	New
7740.3	Charitable trusts - UTC 413			New
		(a)	General rule	New
		(b)	Exception	New
		(c)	Administrative deviation	New
		(d)	Administrative termination of small charitable trusts	New
		(e)	Judicial termination of charitable trusts	New
7740.4	Modification or termination of noncharitable trust - UTC 414			New
		(a)	Trustee's authority	New
		(b)	Court authority	New
		(c)	Distribution of trust property	New
7740.5	Reformation to correct mistakes - UTC 415			New
7740.6	Modification to achieve settlor's tax objectives - UTC 416			New
7740.7	Division of trusts			New
		(a)	Without court approval	New
		(b)	With court approval	New
		(c)	Separate fund	New
7740.8	Combination of trusts			New
		(a)	With court approval	New
		(b)	Without court approval	New
7741	Rights of beneficiary's creditor or assignee - UTC 501			New
7742	Spendthrift provision - UTC 502			New
		(a)	Validity	New
		(b)	Creation	New
		(c)	Effect	New
7743	Exceptions to spendthrift provision - UTC 503			New
		(a)	(Reserved)	New
		(b)	Who may override	New
		(c)	Remedy if unenforceable	New
		(d)	Definition	New
7744	Discretionary trusts; effect of standard - UTC 504			New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(a)	(Reserved)	New
		(b)	Distribution not compelled	New
		(c)	Exception	New
		(d)	Proceeding against trustee	New
		(e)	(Reserved)	New
		(f)	Definition	New
7745	Creditor's claims against settlor - UTC 505(a)			New
7746	Overdue distribution - UTC 506			New
		(a)	Distribution not made within reasonable time	New
		(b)	Definition	New
7747	Personal obligations of trustee - UTC 507			New
7748	Property subject to power of withdrawal - UTC 505(b)			New
7751	Capacity of settlor of revocable trust - UTC 601			New
7752	Revocation or amendment of revocable trust - UTC 602			New
		(a)	Power to revoke or amend	New
		(b)	More than one settlor	New
		(c)	How to revoke or amend	New
		(d)	Delivery of property	New
		(e)	Agent	New
		(f)	Guardian	New
		(g)	Liability	New
7753	Trustee's duties; powers of withdrawal - UTC 603			New
		(a)	Power of settlor	New
		(b)	Holder of power of withdrawal	New
7754	Actions contesting validity of revocable trust			New
		(a)	How action may be commenced	New
		(b)	Time limit	New
		(c)	Grounds for contest	New
7755	Claims and distribution after settlor's death			New
		(a)	Creditors' rights	New
		(b)	Enforcement of claim against revocable trust	New
		(c)	No personal representative	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(d)	Liability of personal representative	New
		(e)	Liability to any creditor	New
		(f)	Rights of creditors against distributed property	New
		(g)	Judicial principles	New
7761	Accepting or declining trusteeship - UTC 701			New
		(a)	Accepting trusteeship	New
		(b)	Rejecting trusteeship	New
		(c)	Actions not constituting acceptance of trusteeship	New
7762	Trustee's bond - UTC 702			New
		(a)	When required	New
		(b)	Judicial authority	New
		(c)	Institutional trustees	New
7763	Cotrustees - UTC 703			New
		(a)	Majority decision	New
		(a.1)	When no majority	New
		(b)	Vacancy	New
		(c)	Performance	New
		(d)	Unavailability	New
		(e)	(Reserved)	New
		(f)	Liability	New
		(g)	Reasonable care	New
		(h)	Dissenting trustee	New
7764	Vacancy in trusteeship; appointment of successor - UTC 704			New
		(a)	When vacancy occurs	New
		(b)	Filling of vacancy	New
		(c)	Filling vacancy for noncharitable trust	New
		(d)	Filling vacancy for charitable trust	New
		(e)	Appointment by court	New
		(f)	Filing appointment	New
7765	Resignation of trustee; filing resignation			New
		(a)	Court approval	New
		(b)	Without court approval if authorized by trust instrument	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(c)	Without court approval and without authorization in trust instrument	New
		(d)	Liability	New
		(e)	Filing resignation	New
7766	Removal of trustee - UTC 706			New
		(a)	Request to remove trustee; court authority	New
		(b)	When court may remove trustee	New
		(c)	Court remedies	New
		(d)	Procedure	New
7767	Delivery of property by former trustee - UTC 707			New
		(a)	Duties and powers of trustee	New
		(b)	Delivery of trust property	New
7768	Compensation of trustee - UTC 708			New
		(a)	If unspecified	New
		(b)	If specified; adjustment	New
		(c)	Entitlement not barred	New
		(d)	Court authority	New
		(e)	Cemetery lots	New
7769	Reimbursement of expenses - UTC 709			New
		(a)	Reimbursement from trust property	New
		(b)	Advance	New
7770	Liability of successor trustee			New
7771	Duty to administer trust - UTC 801			New
7772	Duty of loyalty - UTC 802			New
		(a)	Duty of trustee	New
		(b)	Effect of conflict of interest	New
		(c)	What constitutes conflict of interest	New
		(d)	Transactions between trustee and beneficiary	New
		(e)	Conflict regarding trust opportunity	New
		(f)	(Reserved)	New
		(g)	Business enterprises	New
		(h)	Permissible transactions	New
		(i)	(Reserved)	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
7773	Impartiality - UTC 803			New
7774	Prudent administration - UTC 804			New
7775	Costs of administration - UTC 805			New
7776	Trustee's skills - UTC 806			New
7777	Delegation by trustee			New
		(a)	Standards for delegation	New
		(b)	Agent's duty	New
		(c)	Liability	New
		(d)	Jurisdiction	New
		(e)	When one trustee may delegate to another	New
7778	Powers to direct - UTC 808			New
		(a)	Direction of settlor	New
		(b)	Compliance with power	New
		(c)	Modification or termination of trust	New
		(d)	Fiduciary relationship	New
7779	Control and protection of trust property - UTC 809			New
7780	Recordkeeping and identification of trust property - UTC 810			New
		(a)	Records	New
		(b)	Commingling trust property prohibited	New
		(c)	Designating trust property	New
		(d)	Investing property of separate trusts	New
7780.1	Enforcement and defense of claims - UTC 811			New
7780.2	(Reserved)			New
7780.3	Duty to inform and report			New
		(a)	Duty to respond to requests	New
		(b)	Notice after settlor of revocable trust has been adjudicated incapacitated	New
		(c)	Notice after settlor of revocable trust has died	New
		(d)	Notice after settlor of irrevocable trust has been adjudicated incapacitated	New
		(e)	Notice after settlor of irrevocable trust has died	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(f)	Notice to current beneficiaries	New
		(g)	Change in trusteeship	New
		(h)	Trustee's notice to any beneficiary at any time	New
		(i)	Contents of notice	New
		(j)	Waiver	New
		(k)	Notice to settlor's appointee	New
		(l)	Applicability	New
7780.4	Discretionary powers			New
7780.5	Powers of trustees - UTC 815			New
		(a)	Exercise of power	New
		(b)	(Reserved)	New
7780.6	Illustrative powers of trustee			New
		(a)	Listing	New
		(b)	Effect	New
7780.7	Distribution upon termination			New
7781	Remedies for breach of trust - UTC 1001			New
		(a)	What constitutes breach of trust	New
		(b)	Remedies	New
7782	Damages for breach of trust - UTC 1002			New
		(a)	Liability for breach of trust	New
		(b)	Contribution	New
7783	Damages in absence of breach - UTC 1003			New
		(a)	Profit	New
		(b)	Loss or depreciation	New
7784	(Reserved)			New
7785	Limitation of action against trustee			New
		(a)	Imposed by trustee's written reports	New
		(b)	Five-year absolute bar	New
7786	Reliance on trust instrument - UTC 1006			New
7787	Event affecting administration or distribution - UTC 1007			New
7788	Exculpation of trustee - UTC 1008			New
		(a)	When exculpatory provision unenforceable	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Exculpatory provision by trustee	New
7789	Beneficiary's consent, release or ratification - UTC 1009			New
7790	Limitation on personal liability of trustee - UTC 1010			New
		(a)	When trustee not personally liable	New
		(b)	When trustee personally liable	New
		(c)	Assertion of claim	New
7790.1	Interest as general partner - UTC 1011			New
		(a)	Contractual liability	New
		(b)	Tortious liability	New
		(c)	When immunity inapplicable	New
		(d)	Personal liability of settlor	New
7790.2	Protection of person dealing with trustee - UTC 1012			New
		(a)	(Reserved)	New
		(a.1)	Protection from liability	New
		(b)	No requirement to inquire	New
		(c)	(Reserved)	New
		(c.1)	Ultra vires	New
		(d)	Former trustee	New
		(e)	Effect of other laws	New
7790.3	Certification of trust - UTC 1013			New
		(a)	Contents of certification	New
		(b)	Authentication	New
		(c)	Assurance of representations	New
		(d)	Dispositive trust provisions	New
		(e)	Provisions to be made available upon request	New
		(f)	Reliance on certification	New
		(g)	Enforcement	New
		(h)	Liability	New
		(i)	Applicability	New
7791	Abandonment of property			New
7792	Powers, duties and liabilities identical with personal representatives			New
7793	Effect of removal, or of probate of later will or codicil			New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(a)	No impeachment	New
		(b)	Good faith dealings	New
7794	Title of purchaser			New
7795	Reports for school district trustee			New
		(a)	Scope	New
		(b)	Requirement	New
7796	Jurisdiction			New
7797	Filing accounts			New
		(a)	When to file	New
		(b)	Where to file	New
7798	Failure to present claim or audit			New
		(a)	Applicability	New
		(b)	Bar	New
		(c)	Liens and charges unimpaired	New
7799	Income on distributive shares			New
7799.1	Annexation of account of distributed estate or trust			New
7799.2	Accounts, audits and distribution			New
7799.3	Pooled trusts for persons with disabilities			New
		(a)	Scope	New
		(b)	Organization of pooled trust	New
		(c)	Pooled trust fund	New
		(d)	Reporting	New
		(e)	Coordination of services	New
		(f)	Notice	New
		(g)	Applicability	New
		(h)	Definitions	New
8102	Definitions			Amendment
8104	Trustee's power to adjust			
		(c)	Prohibited adjustments	Amendment
8105	Power to convert to unitrust			
		(a)	Conversion	Amendment
		(b)	Judicially approved conversion	Amendment
		(f)	Allocation	Amendment
		(g.1)	Reconversion from unitrust	New
		(i)	Prohibited conversions	Amendment
8107	Express unitrusts			New
		(a)	General rule	New
		(b)	Definition	New

April 2005 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
8113	Charitable trusts			
		(c)	Effect of election	Amendment
		(f)	Charitable organizations	New
8121	Determination and distribution of net income			Conforming amendment
8141	Character of receipts			
		(c)	When received in partial liquidation	Amendment
		(d)	When not received in partial liquidation	Amendment

The April 2005 report also recommends the repeal of the act of December 9, 2002 (P.L.1379, No.168), known as the Pooled Trust Act.

November 2003 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
723	Situs of testamentary trust			Repeal
724	Situs of inter vivos trust			Repeal
725	Change of situs; order of court			Repeal
751	Appointment; purpose			Conforming amendment
908	Appeals			
		(a)	When allowed	Amendment
3384.1	Notice after settlor of revocable fund has died			New (Conforming amendment)
3534.1	Cost of distribution of tangible personal property			New
3543	Interest or income on distributive shares			
		(a)	Pecuniary legacy	Amendment
		(c)	Demonstrative legacy	Amendment
		(d)	Residuary legacy or devise	Amendment
		(e)	Future date	Amendment
		(f)	Relationship	Amendment
6102	Termination of trusts			Repeal
		(a)	Failure of original purpose	Repeal
		(b)	Distribution of terminated trust	Repeal
		(c)	Other powers	Repeal

November 2003 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
6110	Administration of charitable interests			Repeal
6112	Spendthrift trusts			Repeal
6114	Rules of interpretation			Conforming amendment
Chapter 71	Trust Estates			Repeal
7503	Application of chapter			
		(b)	Exclusion	Amendment
7504	Certain trustee powers not exercisable			
		(c)	Exceptions	New
7506	Certain powers of beneficiaries not exercisable			
		(a)	General rule	Amendment
		(b)	Exception	Amendment
Chapter 77	Trusts			New
7701	Short title - UTC 101			New
7702	Scope - UTC 102			New
7703	Definitions - UTC 103			New
7704	Knowledge - UTC 104			New
		(a)	When person has knowledge	New
		(b)	Employees	New
7705	Trust instrument controls; mandatory rules - UTC 105			New
		(a)	Trust instrument controls	New
		(b)	Mandatory rules	New
7706	Common law of trusts; principles of equity - UTC 106			New
7707	Governing law - UTC 107			New
7708	Situs of trust			New
		(a)	Specified in trust instrument	New
		(b)	Unspecified in trust instrument	New
		(c)	Transfer	New
		(d)	Notice of transfer	New
		(e)	Consent to transfer	New
		(f)	Successor trustee	New
		(g)	Court-directed change in situs	New
		(h)	Claims not discharged	New
7709	Methods and waiver of notice - UTC 109			New
		(a)	Notice generally	New

November 2003 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Unknown identity or location	New
		(c)	Waiver	New
		(d)	Notice of judicial proceeding	New
7710	Notice; others treated as beneficiaries - UTC 110			New
		(a)	Notice	New
		(b)	Charitable organization and others	New
		(c)	Office of Attorney General	New
7710.1	Nonjudicial settlement agreements - UTC 111			New
		(a)	(Reserved)	New
		(b)	General rule	New
		(c)	Exception	New
		(d)	Matters that may be resolved	New
		(e)	Request of court	New
7710.2	Rules of construction - UTC 112			New
7711	Role of court in administration of trust - UTC 201			New
		(a)	Judicial intervention	New
		(b)	Judicial supervision	New
		(c)	Scope of proceeding	New
7712	Jurisdiction over trustee and beneficiary - UTC 202			New
		(a)	Personal jurisdiction over trustee	New
		(b)	Personal jurisdiction over beneficiary	New
		(c)	Additional jurisdictional methods	New
7713	(Reserved)			New
7714	Venue - UTC 204			New
		(a)	General rule	New
		(b)	Exceptions	New
7721	Scope; definition of trust matter			New
		(a)	Scope	New
		(b)	Definition	New
7722	Representation of parties in interest in general			New
		(a)	Judicial proceeding	New
		(b)	Nonjudicial resolution	New

November 2003 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(c)	Permissible consideration	New
7723	Representatives and persons represented			New
7724	Appointment of representative			New
7725	Notice of representation			New
7726	Representation ineffective if person timely objects			New
7731	Creation of trust - UTC 401			New
7732	Requirements for creation - UTC 402			New
		(a)	Requirements	New
		(b)	(Reserved)	New
		(b.1)	Signature by mark or another	New
		(c)	Power to select beneficiary from indefinite class	New
		(d)	Definition	New
7733	Written trusts created in other jurisdictions - UTC 403			New
7734	Trust purposes - UTC 404			New
7735	Charitable purposes; enforcement - UTC 405			New
		(a)	Purposes	New
		(b)	Selection by court	New
		(c)	Proceeding to enforce trust	New
7736	Creation of trust induced by fraud, duress or undue influence - UTC 406			New
7737	Oral trusts unenforceable			New
7738	Trust for care of animal - UTC 408			New
		(a)	Creation and termination	New
		(b)	Enforcement	New
		(c)	Limitation	New
7739	Noncharitable trust without ascertainable beneficiary - UTC 409			New
7740	Termination of trusts; proceedings for termination or modification of trusts - UTC 410			New
		(a)	Termination	New
		(b)	Proceedings for termination or modification	New

November 2003 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
7740.1	Modification or termination of noncharitable irrevocable trust by consent - UTC 411			New
		(a)	Consent by settlor and beneficiaries	New
		(b)	Consent by beneficiaries with court approval	New
		(c)	Spendthrift provision	New
		(d)	Distribution upon termination	New
		(e)	Consent by some beneficiaries with court approval	New
7740.2	Modification or termination of noncharitable irrevocable trust by court - UTC 412			New
		(a)	Unanticipated circumstances	New
		(b)	Inability to administer effectively	New
		(c)	Distribution of property	New
7740.3	Charitable trusts - UTC 413			New
		(a)	General rule	New
		(b)	Exception	New
		(c)	Administrative deviation	New
		(d)	Administrative termination of small charitable trusts	New
		(e)	Judicial termination of charitable trusts	New
7740.4	Modification or termination of noncharitable trust - UTC 414			New
		(a)	Trustee's authority	New
		(b)	Court authority	New
		(c)	Distribution of trust property	New
7740.5	Reformation to correct mistakes - UTC 415			New
7740.6	Modification to achieve settlor's tax objectives - UTC 416			New
7740.7	Division of trusts			New
		(a)	Without court approval	New
		(b)	With court approval	New
		(c)	Separate fund	New
7740.8	Combination of trusts			New
		(a)	With court approval	New

November 2003 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Without court approval	New
7741	Rights of beneficiary's creditor or assignee - UTC 501			New
7742	Spendthrift provision - UTC 502			New
		(a)	Validity	New
		(b)	Creation	New
		(c)	Effect	New
7743	Exceptions to spendthrift provision - UTC 503			New
		(a)	(Reserved)	New
		(b)	Who may override	New
		(c)	When unenforceable	New
		(d)	Definition	New
7744	Discretionary trusts; effect of standard - UTC 504			New
		(a)	(Reserved)	New
		(b)	Distribution not compelled	New
		(c)	Exception	New
		(d)	Proceeding against trustee	New
		(e)	Definition	New
7745	Creditor's claims against settlor - UTC 505			New
		(a)	General rule	New
		(b)	Holder of power of withdrawal	New
7746	Overdue distribution - UTC 506			New
7747	Personal obligations of trustee - UTC 507			New
7751	Capacity of settlor of revocable trust - UTC 601			New
7752	Revocation or amendment of revocable trust - UTC 602			New
		(a)	Power to revoke or amend	New
		(b)	More than one settlor	New
		(c)	How to revoke or amend	New
		(d)	Delivery of property	New
		(e)	Agent	New
		(f)	Guardian	New
		(g)	Liability	New
7753	Trustee's duties; powers of withdrawal - UTC 603			New
		(a)	Power of settlor	New

November 2003 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Holder of power of withdrawal	New
7754	Actions contesting validity of revocable trust			New
		(a)	How action may be commenced	New
		(b)	Time limit	New
		(c)	Grounds for contest	New
7755	Claims and distribution after settlor's death			New
		(a)	Creditors' rights	New
		(b)	Enforcement of claim against revocable trust	New
		(c)	No personal representative	New
		(d)	Liability of personal representative	New
		(e)	Liability to any creditor	New
		(f)	Rights of creditors against distributed property	New
		(g)	Judicial principles	New
7761	Accepting or declining trusteeship - UTC 701			New
		(a)	Accepting trusteeship	New
		(b)	Rejecting trusteeship	New
		(c)	Actions not constituting acceptance of trusteeship	New
7762	Trustee's bond - UTC 702			New
		(a)	When required	New
		(b)	Judicial authority	New
		(c)	Institutional trustees	New
7763	Cotrustees - UTC 703			New
		(a)	Majority decision	New
		(a.1)	When no majority	New
		(b)	Vacancy	New
		(c)	Performance	New
		(d)	Unavailability	New
		(e)	(Reserved)	New
		(f)	Liability	New
		(g)	Reasonable care	New
		(h)	Dissenting trustee	New
7764	Vacancy in trusteeship; appointment of successor - UTC 704			New
		(a)	When vacancy occurs	New
		(b)	Filling of vacancy	New

November 2003 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(c)	Filling vacancy for noncharitable trust	New
		(d)	Filling vacancy for charitable trust	New
		(e)	Appointment by court	New
		(f)	Filing appointment	New
7765	Resignation of trustee; filing resignation			New
		(a)	Court approval	New
		(b)	Without court approval if authorized by trust instrument	New
		(c)	When individual trustee may resign without court approval and without authorization in trust instrument	New
		(d)	Liability	New
		(e)	Filing resignation	New
7766	Removal of trustee - UTC 706			New
		(a)	Request to remove trustee; court authority	New
		(b)	When court may remove trustee	New
		(c)	Court remedies	New
		(d)	Procedure	New
7767	Delivery of property by former trustee - UTC 707			New
		(a)	Duties and powers of trustee	New
		(b)	Delivery of trust property	New
7768	Compensation of trustee - UTC 708			New
		(a)	If unspecified	New
		(b)	If specified; adjustment	New
		(c)	Entitlement not barred	New
		(d)	Court authority	New
		(e)	Cemetery lots	New
7769	Reimbursement of expenses - UTC 709			New
		(a)	Reimbursement from trust property	New
		(b)	Advance	New
7770	Liability of successor trustee			New

November 2003 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
7771	Duty to administer trust - UTC 801			New
7772	Duty of loyalty - UTC 802			New
		(a)	Duty of trustee	New
		(b)	Effect of conflict of interest	New
		(c)	What constitutes conflict of interest	New
		(d)	Transactions between trustee and beneficiary	New
		(e)	Conflict regarding trust opportunity	New
		(f)	(Reserved)	New
		(g)	Business enterprises	New
		(h)	Permissible transactions	New
		(i)	(Reserved)	New
7773	Impartiality - UTC 803			New
7774	Prudent administration - UTC 804			New
7775	Costs of administration - UTC 805			New
7776	Trustee's skills - UTC 806			New
7777	Delegation by trustee			New
		(a)	Standards for delegation	New
		(b)	Agent's duty	New
		(c)	Liability	New
		(d)	Jurisdiction	New
		(e)	When one trustee may delegate to another	New
7778	Powers to direct - UTC 808			New
		(a)	Direction of settlor	New
		(b)	Compliance with power	New
		(c)	Modification or termination of trust	New
		(d)	Fiduciary relationship	New
7779	Control and protection of trust property - UTC 809			New
7780	Recordkeeping and identification of trust property - UTC 810			New
		(a)	Records	New
		(b)	Commingling trust property prohibited	New
		(c)	Designating trust property	New
		(d)	Investing property of separate trusts	New

November 2003 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
7780.1	Enforcement and defense of claims - UTC 811			New
7780.2	(Reserved)			New
7780.3	Duty to inform and report			New
		(a)	Duty to respond to requests	New
		(b)	Notice after settlor of revocable trust has been adjudicated incapacitated	New
		(c)	Notice after settlor of revocable trust has died	New
		(d)	Notice after settlor of irrevocable trust has been adjudicated incapacitated	New
		(e)	Notice after settlor of irrevocable trust has died	New
		(f)	Notice to current beneficiaries	New
		(g)	Change in trusteeship	New
		(h)	Trustee's notice to any beneficiary at any time	New
		(i)	Contents of notice	New
		(j)	Waiver	New
		(k)	Applicability	New
7780.4	Discretionary powers			New
7780.5	Powers of trustees - UTC 815			New
		(a)	Exercise of power	New
		(b)	(Reserved)	New
7780.6	Illustrative powers of trustees			New
		(a)	Listing	New
		(b)	Effect	New
7780.7	Distribution upon termination			New
7781	Remedies for breach of trust - UTC 1001			New
		(a)	What constitutes breach of trust	New
		(b)	Remedies	New
7782	Damages for breach of trust - UTC 1002			New
		(a)	Amount of damages	New
		(b)	Contribution	New
7783	Damages in absence of breach - UTC 1003			New
		(a)	Profit	New
		(b)	Loss or depreciation	New
7784	(Reserved)			New

November 2003 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
7785	Limitation of action against trustee			New
		(a)	(Reserved)	New
		(a.1)	Imposed by trustee's written reports	New
		(b)	(Reserved)	New
		(c)	Five-year absolute bar	New
7786	Reliance on trust instrument - UTC 1006			New
7787	Event affecting administration or distribution - UTC 1007			New
7788	Exculpation of trustee - UTC 1008			New
		(a)	When exculpatory provision unenforceable	New
		(b)	Exculpatory provision by trustee	New
7789	Beneficiary's consent, release or ratification - UTC 1009			New
7790	Limitation on personal liability of trustee - UTC 1010			New
		(a)	When trustee not personally liable	New
		(b)	When trustee personally liable	New
		(c)	Assertion of claim	New
7790.1	Interest as general partner - UTC 1011			New
		(a)	Contractual liability	New
		(b)	Tortious liability	New
		(c)	When immunity inapplicable	New
		(d)	Personal liability of settlor	New
7790.2	Protection of person dealing with trustee - UTC 1012			New
		(a)	(Reserved)	New
		(a.1)	Protection from liability	New
		(b)	No requirement to inquire	New
		(c)	(Reserved)	New
		(c.1)	Ultra vires	New
		(d)	Former trustee	New
		(e)	Effect of other laws	New
7790.3	Certification of trust - UTC 1013			New

November 2003 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(a)	Contents of certification	New
		(b)	Authentication	New
		(c)	Assurance of representations	New
		(d)	Dispositive trust provisions	New
		(e)	Provisions to be made available upon request	New
		(f)	Reliance on certification	New
		(g)	Enforcement	New
		(h)	Liability	New
		(i)	Applicability	New
7791	Abandonment of property			New
7792	Powers, duties and liabilities identical with personal representatives			New
7793	Effect of removal, or of probate of later will or codicil			New
		(a)	No impeachment	New
		(b)	Good faith dealings	New
7794	Title of purchaser			New
7795	Reports for school district trustee			New
		(a)	Scope	New
		(b)	Requirement	New
7796	Jurisdiction			New
7797	Filing accounts			New
		(a)	When to file	New
		(b)	Where to file	New
7798	Failure to present claim or audit			New
		(a)	Applicability	New
		(b)	Bar	New
		(c)	Liens and charges unimpaired	New
7799	Income on distributive shares			New
7799.1	Annexation of account of distributed estate or trust			New
7799.2	Accounts, audits and distribution			New
7799.3	Pooled trusts for persons with disabilities			New
		(a)	Scope	New
		(b)	Organization of pooled trust	New
		(c)	Pooled trust fund	New
		(d)	Reporting	New
		(e)	Coordination of services	New

November 2003 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(f)	Notice	New
		(g)	Applicability	New
		(h)	Definitions	New
8102	Definitions			Amendment
8105	Power to convert to unitrust			
		(a)	Conversion	Amendment
8121	Determination and distribution of net income			Conforming amendment

The November 2003 report also recommends the repeal of the act of December 9, 2002 (P.L.1379, No.168), known as the Pooled Trust Act.

February 2002 Report				
18 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
2713	Neglect of care-dependent person			
		(e)	Treatment in conformance with care-dependent person's right to accept or refuse services	Amendment

February 2002 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
711	Mandatory exercise of jurisdiction through orphans' court division in general			Conforming amendment
Chapter 54: 5401-5416	Advance Directive for Health Care			Repeal
Chapter 54	Health Care			New
5401	Applicability			New
		(a)	General rule	New
		(b)	Preservation of existing rights	New
5402	Definitions			New
5403	Legislative findings and intent			New
		(a)	Intent	New
		(b)	Presumption not created	New
		(c)	Findings in general	New

February 2002 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5404	Compliance			New
		(a)	Notification by attending physician or health care provider	New
		(b)	Transfer	New
		(c)	Employee or staff member of health care provider	New
		(d)	Liability	New
5405	Death not suicide or homicide			New
5406	Life insurance			New
5407	Health care instruments optional			New
5408	Pregnancy			New
		(a)	Declarations and health care decisions	New
		(b)	Pregnancy test	New
		(c)	Payment of expenses by Commonwealth	New
5409	Liability			New
		(a)	General rule	New
		(b)	Same effect as if dealing with principal	New
		(c)	Good faith of health care agent	New
5410	Penalties			New
		(a)	Felonies of the third degree	New
		(b)	Prosecution for criminal homicide	New
5411	Combining health care instruments			New
		(a)	General rule	New
		(b)	Form	New
5421	Short title of subchapter			New
5422	Execution			New
		(a)	Who may make	New
		(b)	Requirements	New
		(c)	Witnesses	New
5423	Form			New
5424	Operation			New
		(a)	When operative	New
		(b)	Compliance	New
		(c)	Invalidity of specific direction	New
		(d)	Medical record	New
		(e)	Duration	New

February 2002 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(f)	Absence of declaration	New
		(g)	Duty of physician to confirm terminal condition	New
5425	Revocation			New
		(a)	When declaration may be revoked	New
		(b)	Effect of revocation	New
		(c)	Medical record	New
5426	Emergency medical services			New
		(a)	Care given prior to declaration taking effect	New
		(b)	Care given after declaration takes effect	New
		(c)	Uncertainty regarding validity of declaration	New
5431	Short title of subchapter			New
5432	Execution			New
		(a)	Who may make	New
		(b)	Requirements	New
		(c)	Witnesses	New
5433	Form			New
		(a)	Requirements	New
		(b)	Optional provisions	New
		(c)	Written form	New
5434	Operation			New
		(a)	When operative	New
		(b)	When inoperative	New
		(c)	Invalidity of specific direction	New
		(d)	Duration	New
		(e)	Court approval unnecessary	New
5435	Appointment of health care agents			New
		(a)	Multiple and successor health care agents	New
		(b)	Whom may not be appointed health care agent	New
5436	Authority of health care agent			New
		(a)	Extent of authority	New
		(b)	Life-sustaining treatment decisions	New
		(c)	Health care decisions	New
		(d)	Health care information	New
5437	Countermand			New
5438	Amendment			New

February 2002 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5439	Effect of divorce			New
5440	Revocation			New
		(a)	When health care power of attorney may be revoked	New
		(b)	Reliance on health care power of attorney	New
		(c)	Subsequent action by agent	New
5441	Relation of health care agent to court-appointed guardian and other agents			New
		(a)	Accountability of health care agents	New
		(b)	Nomination of guardian of person	New
		(c)	Reasonable expenses	New
5442	Duties of attending physician and health care provider			New
		(a)	Duty to confirm terminal condition	New
		(b)	Communication of health care decision	New
		(c)	Compliance with decisions of health care agent	New
		(d)	Medical record	New
		(e)	Record of determination	New
5443	Effect on other State law			New
		(a)	Mental health	New
		(b)	Prohibited care	New
		(c)	Consent	New
		(d)	Preservation of religious rights	New
		(e)	Rights of individuals	New
		(f)	Disclosure	New
5444	Conflicting health care powers of attorney			New
5445	Validity			New
5602	Form of power of attorney			
		(a)	Specification of powers	Amendment
5603	Implementation of power of attorney			
		(h)	Power to authorize admission to medical facility and power to authorize medical procedures	Repeal

June 2001 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
724	Situs of inter vivos trust			
		(b)	Not provided for in trust instrument	Amendment
2104	Rules of succession			Amendment
3701	Power of decedent			Amendment
3702	Equitable apportionment of Federal estate tax			
		(f)	Additional Federal estate tax	Amendment
		(h)	Interest and penalties	Conforming amendment
		(j)	Gift tax	New
5164	Distributions for support and education			Conforming amendment
5301	Short title of chapter and definitions			
		(b)	Definitions	Amendment
5320	Termination of custodianship			Amendment
5321	Delay in transfer of custodial property after minor attains age 21			New
		(a)	General rule	New
		(b)	How to specify a delayed time for transfer	New
		(c)	Transfer authorized by will or trust; nomination of custodian	New
		(d)	Transfer by exercise of power [of] appointment	New
		(e)	When section not applicable	New
		(f)	When transfer does not specify age	New
		(g)	When transfer provides for a longer duration of custodianship than permitted by this section	New
5536	Distributions of income and principal during incapacity			
		(a)	In general	Conforming amendment
6205	Effect of disclaimer			
		(a)	In general	Amendment
		(d)	Rights of creditors of disclaimant	New
7104	Power of trustee to resign			New
		(a)	Court approval	New

June 2001 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Without court approval if authorized by governing instrument	New
		(c)	When individual trustee may resign without court approval and without authorization in governing instrument	New
		(d)	Liability	New
		(e)	Definition	New
7105	Filing resignations and appointments			New
Chapter 81	Principal and income			Repeal
				New
8101	Scope			New
8102	Definitions			New
8103	Fiduciary duties; general principles			New
		(a)	Allocation	New
		(b)	Discretionary power	New
8104	Trustee's power to adjust			New
		(a)	Adjustment	New
		(b)	Considerations	New
		(c)	Prohibited adjustments	New
		(d)	Permissible adjustment when otherwise prohibited	New
		(e)	Release of the power to adjust	New
		(f)	Application	New
8105	Power to convert to unitrust			New
		(a)	Conversion	New
		(b)	Judicially approved conversion	New
		(c)	Consideration	New
		(d)	Post conversion	New
		(e)	Discretion of trustee	New
		(f)	Allocation	New
		(g)	Court orders	New
		(h)	Application	New
		(i)	Prohibited conversions	New
		(j)	Permissible conversion when otherwise prohibited	New
		(k)	Release of the power to convert	New

June 2001 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
8106	Judicial control of discretionary powers			New
		(a)	Standard of review	New
		(b)	Remedies	New
8107	(Reserved)			New
8108	(Reserved)			New
8109	(Reserved)			New
8110	(Reserved)			New
8111	(Reserved)			New
8112	(Reserved)			New
8113	Charitable trusts			New
		(a)	Election	New
		(b)	Eligibility for election	New
		(c)	Effect of election	New
		(d)	Revocation of election	New
		(e)	Value determination	New
8121	Determination and distribution of net income			New
8122	Distribution to residuary and remainder beneficiaries			New
		(a)	Distribution of net income	New
		(b)	Allocation of net income	New
		(c)	Collected but undistributed net income	New
		(d)	Application	New
		(e)	Distribution date	New
8131	When right to income begins and ends			New
		(a)	Accrual of income interest	New
		(b)	Asset subject to a trust	New
		(c)	Asset subject to a successive income interest	New
		(d)	End of income interest	New
8132	Apportionment of receipts and disbursements when decedent dies or income interest begins			New
		(a)	Allocation to principal	New
		(b)	Allocation to income	New
		(c)	Due dates	New
8133	Apportionment when income interest ends			New
		(a)	End of mandatory income interest	New
		(b)	Proration of final payment	New

June 2001 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(c)	Definition	New
8141	Character of receipts			New
		(a)	Allocation to income	New
		(b)	Allocation to principal	New
		(c)	When received in partial liquidation	New
		(d)	When not received in partial liquidation	New
		(e)	Reliance upon a statement	New
		(f)	Definition	New
8142	Distribution from trust or estate			New
8143	Business and other activities conducted by trustee			New
		(a)	Separate accounting for business or activity	New
		(b)	Net receipts	New
		(c)	Permissible activities for separate accounting	New
8144	Principal receipts			New
8145	Rental property			New
		(a)	Rent	New
		(b)	Deposit	New
8146	Obligation to pay money			New
		(a)	Interest allocated to income	New
		(b)	Allocation of obligations	New
		(c)	Application	New
8147	Insurance policies and similar contracts			New
		(a)	General rule	New
		(b)	Allocation of proceeds to income	New
		(c)	Application	New
8148	Insubstantial allocations not required			New
8149	Retirement benefits, individual retirement accounts, deferred compensation, annuities and similar payments			New
		(a)	General rule	New
		(b)	Allocation under contract calling for equal installments	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(c)	Allocation when internal net income of fund is readily ascertained	New
		(d)	When not otherwise allocable to income	New
		(e)	Allocation to obtain marital deduction	New
		(f)	Application	New
		(g)	Definition	New
8150	Liquidating asset			New
		(a)	Allocation	New
		(b)	Definition	New
8151	Minerals, water and other natural resources			New
		(a)	Allocation for receipts from minerals and other natural resources	New
		(b)	Allocation for receipts from water	New
		(c)	Application	New
8152	Timber			New
		(a)	Allocation of net receipts	New
		(b)	Determining net receipts	New
		(c)	Application	New
8153	Property not productive of income			New
		(a)	General rule	New
		(b)	Other cases	New
8154	Derivatives and options			New
		(a)	Derivatives	New
		(b)	Options	New
		(c)	Definition	New
8155	Asset-backed securities			New
		(a)	General rule	New
		(b)	Allocation where liquidating trust's interest in security	New
		(c)	Definition	New
8161	Mandatory disbursements from income			New
8162	Mandatory disbursements from principal			New
		(a)	Mandatory disbursements	New
		(b)	Mandatory reimbursement	New
8163	Discretionary allocation of disbursements			New

June 2001 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
8164	Transfers from income to principal for depreciation			New
		(a)	Transfers	New
		(b)	Separate fund unnecessary for amount transferred	New
		(c)	Definition	New
8165	Transfers from income to reimburse principal			New
		(a)	Permissible reimbursements	New
		(b)	Continued transfers	New
		(c)	Application	New
8166	Income taxes			New
		(a)	Receipts allocated to income	New
		(b)	Receipts allocated to principal	New
		(c)	Tax on entity's taxable income	New
		(d)	Reductions in receipts allocated to principal or income	New
8167	Adjustments between principal and income because of taxes			New
8191	Uniformity of application and construction			New

November 1998 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5601	General provisions			
		(a)	General rule	Amendment
		(b)	Execution	Amendment
		(c)	Notice	New
		(d)	Acknowledgment executed by agent	New
		(e)	Fiduciary relationship	New
		(f)	Definition	New
5601.2	Special rules for gifts			New
		(a)	General rule	New
		(b)	Limited gifts	New
		(c)	Unlimited gifts	New
		(d)	Nature of gifts	New

November 1998 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(e)	Equity	New
		(f)	Third party	New
5602	Form of power of attorney			
		(a)	Specification of powers	Amendment
		(b)	Appointment of attorney-in-fact and successor attorney	Amendment
5603	Implementation of power of attorney			
		(a)	Power to make gifts and power to make limited gifts	Amendment
		(b)	Power to create a trust	Amendment
		(c)	Power to make additions to an existing trust	Amendment
		(d)	Power to claim an elective share	Amendment
		(e)	Power to disclaim any interest in property	Amendment
		(f)	Power to renounce fiduciary position	Amendment
		(g)	Power to withdraw and receive	Amendment
		(h)	Power to authorize admission to medical facility and power to authorize medical procedures	Amendment
		(i)	Power to engage in real property transactions	Amendment
		(j)	Power to engage in tangible personal property transactions	Amendment
		(k)	Power to engage in stock, bond and other securities transactions	Amendment
		(l)	Power to engage in commodity and option transactions	Amendment
		(m)	Power to engage in banking and financial transactions	Amendment
		(n)	Power to borrow money	Amendment
		(o)	Power to enter safe deposit boxes	Amendment
		(p)	Power to engage in insurance transactions	Amendment
		(q)	Power to engage in retirement plan transactions	Amendment

November 1998 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(r)	Power to handle interests in estates and trusts	Amendment
		(s)	Power to pursue claims and litigation	Amendment
		(t)	Power to receive government benefits	Amendment
		(u)	Power to pursue tax matters	Amendment
		(u.1)	Power to make anatomical gift	Amendment
5604	Durable powers of attorney			
		(a)	Definition	Amendment
		(b)	Durable power of attorney not affected by disability or lapse of time	Amendment
		(c)	Relation of attorney-in-fact to court-appointed guardian	Amendment
5605	Power of attorney not revoked until notice			
		(a)	Death of principal	Amendment
		(b)	Disability or incapacity of principal	Amendment
		(c)	Divorce	Amendment
5606	Proof of continuance of powers of attorney by affidavit			Amendment
5607	Corporate attorney-in-fact			Amendment
5608	Liability			
		(a)	Third party liability	Amendment
		(b)	Third party immunity	Amendment
5609	Compensation and reimbursement for expenses			New
		(a)	Compensation	New
		(b)	Reimbursement for expenses	New
5610	Account			New
5611	Validity			New
8611	Persons who may execute anatomical gift			
		(a)	General rule	Conforming amendment

March 1998 Report				
15 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5548	Investment of trust funds			
		(a)	General rule	Amendment
		(b)	Use and management	Amendment
		(c)	Determination of income	Amendment
		(e)	Definition	Repeal
5549	Transfer of trust or other assets to institutional trustee			
		(c)	Amount and frequency of payment	Amendment
5585	Establishment or use of common trust funds authorized			
		(a)	General rule	Amendment

March 1998 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
751	Appointment; purpose			Amendment
3316	Investment of funds			Conforming amendment
3316.1	Set aside			New
5145	Investments			Conforming amendment
5306	Other transfer by fiduciary			
		(c)	Additional requirements for transfer	Amendment
5401	Definitions			New
	Short title of chapter			Amendment
5402	Legislative findings and intent			Amendment
		(b)	Intent	Amendment
5403	Definitions			Repeal
5404	Declaration			
		(a)	Execution	Amendment
		(b)	Form	Amendment
		(c)	Invalidity of specific direction	Amendment
		(d)	Medical record	Amendment
5405	When declaration becomes operative			Amendment
5407	Liability			
		(a)	General rule	Amendment
		(b)	Absence of declaration	Amendment

March 1998 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5409	Unwillingness to comply; transfer of declarant			Amendment
		(a)	Attending physician or health care provider	Amendment
		(b)	Employee or staff member of health care provider	Amendment
		(c)	Liability	Amendment
5410	Effect on suicide and life insurance			
		(a)	Criminal effect	Amendment
		(b)	Life insurance	Amendment
5411	Declaration optional			Amendment
5412	Preservation of existing rights			Amendment
5413	Emergency medical services			
		(a)	Care given prior to declaration taking effect	Amendment
5415	Penalties			Amendment
5416	Severability			Repeal
5421	Short title of subchapter			New
5422	General provisions			New
		(a)	Who may execute a health care power of attorney	New
		(b)	Execution	New
5423	Form of health care power of attorney			New
		(a)	Requirements	New
		(b)	Optional provisions	New
		(c)	Invalidity of specific direction	New
5424	Countermand, amendment and revocation			New
		(a)	Countermand of health care decision	New
		(b)	Amendment	New
		(c)	Divorce	New
		(d)	Revocation	New
		(e)	Effect of revocation	New
5425	Operation of health care power of attorney			New
		(a)	When operative	New
		(b)	Duration	New
		(c)	Extent of authority of agent	New
		(d)	Life-sustaining treatment decisions	New
		(e)	Health care decisions	New

March 1998 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(f)	Health care information	New
		(g)	Court approval unnecessary	New
5426	Appointment of health care agents			New
		(a)	Multiple and successor health care agents	New
		(b)	Limitation on appointment of agent	New
5427	Relation of health care agent to court-appointed guardian and other agents			New
		(a)	Accountability of health care agent	New
		(b)	Nomination of guardian of person	New
		(c)	Reasonable expenses	New
5428	Decisions by health care representative			New
		(a)	General rule	New
		(b)	Extent of authority of health care representative	New
		(c)	Who may act as health care representative	New
		(d)	Disqualification	New
		(e)	Limitation on designation of health care representative	New
		(f)	Decision of health care representative	New
		(g)	Duty of health care representative	New
		(h)	Countermand of health care decision	New
		(i)	Court approval unnecessary	New
		(j)	Written declaration of health care representative	New
5429	Duties of attending physician and health care provider			New
		(a)	Communication of health care decision	New
		(b)	Compliance with decisions of health care agent or health care representative	New
		(c)	Medical record	New
		(d)	Medical record entry	New
		(e)	Record of determination	New

March 1998 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5430	Limitations on liability			New
		(a)	Attending physician, health care provider and health care institution	New
		(b)	Health care agent	New
		(c)	Health care representative	New
		(d)	Death not suicide or homicide	New
5431	Unwillingness to comply and transfer of principal			New
		(a)	Attending physician or health care provider	New
		(b)	Employee or staff member of health care provider	New
		(c)	Liability	New
5432	Effect on life insurance			New
5433	Conditioning services or action			New
5434	Criminal penalties			New
		(a)	Tampering with a health care power of attorney	New
		(b)	Tampering resulting in death	New
5435	Effect on other State law			New
		(a)	Mental health	New
		(b)	Prohibited care	New
		(c)	Consent	New
		(d)	Preservation of religious rights	New
		(e)	Individual rights	New
		(f)	Disclosure	New
5436	Conflicting health care powers of attorney			New
5437	Validity			New
5602	Form of power of attorney			
		(a)	Specification of powers	Amendment
5603	Implementation of power of attorney			
		(h)	Power to authorize admission to medical facility and power to authorize medical procedures	Repeal
7134	Investments			Conforming amendment
7137	Limitations on powers			
		(a)	In general	New

March 1998 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Definition	New
		(c)	When section not applicable	New
		(d)	Trust reference	New
7191	Separate trusts			
		(a)	Without court approval	New
		(b)	With court approval	Amendment
		(c)	Separate fund	New
Chapter 72	Prudent Investor Rule			New
7201	Definitions			New
7202	Default rule			New
		(a)	General rule	New
		(b)	Exception	New
		(c)	Court direction	New
7203	Prudent investor rule			New
		(a)	General rule	New
		(b)	Permissible investments	New
		(c)	Considerations in making investments and management decisions	New
7204	Diversification			New
7205	Retention of inception assets			New
7206	Delegation			New
		(a)	Permissible delegation	New
		(b)	Duties of fiduciary	New
		(c)	Duties of investment agent	New
		(d)	Jurisdiction	New
		(e)	When co-fiduciary may delegate to another co-fiduciary	New
		(f)	Mutual funds	New
7207	Retention of cash; temporary investments			New
		(a)	Uninvested cash	New
		(b)	Temporary investments	New
7208	Life insurance			New
7209	Mutual funds			New
7210	Common trust fund and mortgage investment fund			New
7211	Further investment authority			New
7212	Degree of care			New
7213	Judgment of fiduciary's decisions			New
7214	Language invoking chapter			New
Chapter 73	Fiduciaries Investments			Conforming amendment

March 1998 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
7301	Definition of fiduciary			Conforming amendment
8113	Charitable trusts			New
		(a)	Election	New
		(b)	Eligibility for election	New
		(c)	Effect of election	New
		(d)	Revocation of election	New
		(e)	Value determination	New

May 1996 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
711	Mandatory exercise of jurisdiction through orphans' court division in general			Amendment
712	Nonmandatory exercise of jurisdiction through orphans' court division			Conforming amendment
5511	Petition and hearing; independent evaluation			
		(a)	Resident	Amendment
		(f)	Who may be appointed guardian	Amendment
5512.1	Determination of incapacity and appointment of guardian			
		(a)	Determination of incapacity	Amendment
		(c)	Plenary guardian of the person	Amendment
		(e)	Plenary guardian of the estate	Amendment
5513	Emergency guardian			Amendment
5518	Evidence of incapacity			Amendment
5518.1	Cross-examination of witnesses			Amendment
5521	Provisions concerning powers, duties and liabilities			
		(c)	Reports	Amendment
5522	Power to lease			Amendment
5531	When accounting filed			Amendment

April 1994 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
712	Nonmandatory exercise of jurisdiction through orphans' court division			Amendment
724	Situs of inter vivos trust			
		(b)	Not provided for in trust instrument	Amendment
2101	Intestate estate			Amendment
		(b)	Modification by decedent's will	New
2502	Form and execution of a will			Amendment
2517	Rule in Shelley's case and doctrine of worthier title			Amendment
		(b)	Doctrine of worthier title	New
2521	Penalty clause for contest			New
3101	Payments to family and funeral directors			
		(a)	Wages, salary or employee benefits	Amendment
3102	Settlement of small estates on petition			Amendment
3121	When allowable			Amendment
3504	Representation of parties in interest			Amendment
3531	Estates not exceeding \$10,000			Amendment
3701	Power of decedent			Amendment
5101	When guardian unnecessary			Amendment
5602	Form of power of attorney			
		(a)	Specification of powers	Amendment
5603	Implementation of power of attorney			
		(h)	Power to authorize admission to medical facility and power to authorize medical procedures	Repeal
5621	Definitions			New
5622	General provisions			New
		(a)	Who may execute a health care power of attorney	New
		(b)	Execution	New
5623	Form of health care power of attorney			New
		(a)	Requirements	New
		(b)	Optional provisions	New
		(c)	Optional form	New

April 1994 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5624	Countermand, amendment and revocation			New
		(a)	Countermand of health care decision	New
		(b)	Amendment and divorce	New
		(c)	Revocation	New
		(d)	Communication of amendment or revocation	New
5625	Resignation of attorney-in-fact			New
5626	Operation of health care power of attorney			New
		(a)	When operative	New
		(b)	Duration	New
		(c)	Extent of authority of attorney-in-fact	New
		(d)	Life-sustaining treatment decisions	New
		(e)	Nutrition and hydration decisions	New
		(f)	Health care decisions	New
		(g)	Health care information	New
		(h)	Court approval unnecessary	New
5627	Appointment of health care attorneys-in-fact			New
		(a)	Multiple and successor health care attorneys-in-fact	New
		(b)	Limitation on appointment of attorney-in-fact	New
5628	Relation of health care attorney-in-fact to court-appointed guardian			New
		(a)	Accountability of health care attorney-in-fact	New
		(b)	Nomination of guardian of person	New
5629	Decisions by health care representative			New
		(a)	General rule	New
		(b)	Extent of authority of health care representative	New
		(c)	Who may act as health care representative	New
		(d)	Disqualification	New

April 1994 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(e)	Limitation on designation of health care representative	New
		(f)	Decision of health care representative	New
		(g)	Alternate health care representative	New
		(h)	Duty of health care representative	New
		(i)	Countermand of health care decision	New
		(j)	Court approval unnecessary	New
		(k)	Written declaration of health care representative	New
5630	Duties of attending physician and health care provider			New
		(a)	Communication of health care decision	New
		(b)	Compliance with decisions of health care attorney-in-fact or health care representative	New
		(c)	Medical record	New
		(d)	Medical record entry	New
		(e)	Record of determination	New
5631	Immunities			New
		(a)	Attending physician, health care provider and health care institution	New
		(b)	Health care attorney-in-fact	New
		(c)	Health care representative	New
		(d)	Death not suicide or homicide	New
5632	Unwillingness to comply and transfer of principal			New
		(a)	Attending physician or health care provider	New
		(b)	Liability	New
5633	Effect on life insurance			New
5634	Conditioning services or action			New
5635	Penalties			New
		(a)	Tampering with a health care power of attorney	New
		(b)	Tampering resulting in death	New
5636	Effect on other State law			New

April 1994 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(a)	Health care decision	New
		(b)	Mental health	New
		(c)	Prohibited care	New
		(d)	Notice	New
		(e)	Consent	New
		(f)	Preservation of religious rights	New
		(g)	Individual's rights	New
5637	Conflicting health care powers of attorney			New
5638	Validity			New
6110	Administration of charitable estates			Amendment
		(a)	General rule	Amendment
6111.2	Effect of divorce on designation of beneficiaries			Amendment
6117	Rule in Shelley's case and doctrine of worthier title			Amendment
		(b)	Doctrine of worthier title	New
6201	Right to disclaim			Amendment
7183	Notice, audits, reviews, and distribution			Amendment

The April 1994 report also recommends the amendment of the act of June 17, 1971 (P.L.181, No.23), known as the Charitable Instruments Act of 1971.

June 1991 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
711	Mandatory exercise of jurisdiction through orphans' court division in general			Amendment
745	Advertisement of accounts			
		(b)	Manner of advertisement	Amendment
911	Attestation of certain applications and documents			New
2204	Disclaimers, releases and charges against elective share			
		(a)	Disclaimers	Amendment
2507	Modification by circumstances			Amendment
2514	Rules of interpretation			Amendment

June 1991 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
2515	Devise or bequest to trust			Amendment
Chapter 27	Contractual Arrangements Relating to Succession			New
2701	Contracts concerning succession			New
		(a)	Establishment of contract	New
		(b)	Joint will or mutual wills	New
3316	Investment of funds			Amendment
3321	Nominee registration; corporate fiduciary as attorney-in-fact; deposit of securities in a clearing corporation; book-entry securities			
		(e)	Accounting for book-entry securities	Amendment
3330	Notice of devise or bequest to corporation or association			Repeal
	Notice to beneficiaries and heirs			New
		(a)	Requirement of notice	New
		(b)	Contents of notice	New
		(c)	Manner of notice	New
		(d)	Certification	New
		(e)	No rights	New
3503	Notice to parties in interest			Amendment
3532	At risk of personal representative			
		(a)	Rights of claimants against personal representative	Amendment
		(b)	Rights of claimants against distributed property	Amendment
		(b.1)	Limitation on rights of claimants	New
3701	Power of decedent			Technical amendment
3702	Equitable apportionment of Federal estate tax			
		(a)	General rule	Technical amendment
		(b)	Pre-residuary	Technical amendment
		(c)	Deductions	Technical amendment

June 1991 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(d)	Credits	Technical amendment
3703	Apportionment of Pennsylvania inheritance tax			Amendment
3706	Enforcement of contribution or exoneration of Federal estate tax			
		(c)	Suspending distribution	Amendment
5164	Distributions for support and education			Amendment
Chapter 53	Pennsylvania Uniform Gifts to Minors Act			Repeal
	Pennsylvania Uniform Transfers to Minors Act			New
5301	Short title of chapter and definitions			New
		(a)	Short title of chapter	New
		(b)	Definitions	New
5302	Scope and jurisdiction			New
		(a)	Application of chapter	New
		(b)	Jurisdiction over custodian	New
		(c)	Laws of other states	New
5303	Nomination of custodian			New
		(a)	General rule	New
		(b)	Qualification of custodian	New
		(c)	When effective	New
5304	Transfer by gift or exercise of power of appointment			New
5305	Transfer authorized by will or trust			New
		(a)	General rule	New
		(b)	Transfer to custodian	New
		(c)	Designation of custodian	New
5306	Other transfer by fiduciary			New
		(a)	Irrevocable transfer by personal representative or trustee	New
		(b)	Irrevocable transfer by guardian	New
		(c)	Additional requirements for transfer	New
5307	Transfer by obligor			New
		(a)	Irrevocable transfer for benefit of minor	New
		(b)	Transfer to custodian	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(c)	Transfer to minor's family or trust company	New
5308	Receipt for custodial property			New
5309	Manner of creating custodial property and effecting transfer			New
		(a)	Creation of custodial property	New
		(b)	Form	New
		(c)	Control of custodial property	New
5310	Single custodianship			New
5311	Validity and effect of transfer			New
		(a)	Validity of transfer	New
		(b)	Irrevocability of transfer	New
		(c)	Incorporation of provisions of this chapter	New
5312	Care of custodial property			New
		(a)	Duties of custodian	New
		(b)	Standard of care	New
		(c)	Life insurance and endowment policies	New
		(d)	Segregation of custodial property	New
		(e)	Records	New
5313	Powers of custodian			New
		(a)	General rule	New
		(b)	Liability for breach of standard of care	New
5314	Use of custodial property			New
		(a)	Without court order	New
		(b)	With court order	New
		(c)	Obligation of support not affected	New
5315	Expenses, compensation and bond of custodian			New
		(a)	Expenses	New
		(b)	Compensation	New
		(c)	Bond	New
5316	Exemption of third person from liability			New
5317	Liability to third persons			New
		(a)	Claim against custodial property	New
		(b)	Limitation on custodian's property	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(c)	Limitation on minor's personal liability	New
5318	Renunciation, resignation, death or removal of custodian			New
		(a)	Renunciation	New
		(b)	Designation of trust company or adult as successor custodial	New
		(c)	Resignation	New
		(d)	Ineligibility, death or incapacitation	New
		(e)	Transfer of custodial property and records to successor custodian	New
		(f)	Removal for cause	New
5319	Accounting by and determination of liability of custodian			New
		(a)	Petition	New
		(b)	Petition by successor custodian for accounting by predecessor	New
		(c)	Court order to account	New
		(d)	Court order when custodian removed	New
5320	Termination of custodianship			New
5513	Temporary guardian			Amendment
5536	Distributions of income and principal during incompetency			
		(b)	Estate plan	Amendment
5601	General provision			Amendment (restructured)
		(a)	General rule	Amendment
		(b)	Execution	New
		(c)	Rule of interpretation	New
5601.1	Powers of attorney presumed durable			New
5602	Form of power of attorney			
		(a)	Specification of powers	Amendment
		(b)	Appointment of attorney-in-fact and successor attorney	Amendment
5603	Implementation of power of attorney			

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(a)	Power to make gifts and power to make limited gifts	Conforming amendment
		(i)	Power to engage in real property transactions	New
		(j)	Power to engage in tangible personal property transactions	New
		(k)	Power to engage in stock, bond and other securities transactions	New
		(l)	Power to engage in commodity and option transactions	New
		(m)	Power to engage in banking and financial transactions	New
		(n)	Power to borrow money	New
		(o)	Power to enter safe deposit boxes	New
		(p)	Power to engage in insurance transactions	New
		(q)	Power to engage in retirement plan transactions	New
		(r)	Power to handle interests in estates and trusts	New
		(s)	Power to pursue claims and litigation	New
		(t)	Power to receive government benefits	New
		(u)	Power to pursue tax matters	New
		(v)	Power to pursue other business and financial matters	New
		(w)	Power to exercise in the sole discretion of the attorney-in-fact the most complete and comprehensive powers lawful for a principal to give in connection with his property and financial affairs	New
		(x)	Powers generally	New
5604	Durable powers of attorney			
		(a)	Definition	Amendment
		(b)	Durable power of attorney not affected by disability	Amendment
5605	Power of attorney not revoked until notice			

June 1991 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(c)	Divorce	New
5606	Proof of continuance of durable or other powers of attorney by affidavit			Amendment
5608	Liability			New
		(a)	Third party liability	New
		(b)	Third party immunity	New
5704	Notice to absentee			Amendment
6111.1	Modification by divorce			Amendment
6111.2	Effect of divorce on designation of beneficiaries			New
6114	Rules of interpretation			Amendment
7188	Annexation of account of distributed estate or trust			Amendment
7191	Separate trusts			Amendment
7314.1	Mutual funds			New
7315.1	Retention of cash; temporary investments			
		(b)	Temporary investments	Amendment
8301	Powers of court to authorize sale, etc. of real property			Amendment

June 1991 Report				
72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
1702	Definitions			Amendment
1707	Transfers subject to tax			
		(c)	Inter vivos transfers	Amendment
		(d)	Trusts and similar arrangements for spouses	New
1708	Joint tenancy			
		(b)	Husband and wife	Amendment
1711	Transfers not subject to tax			
		(k)	Property subject to power of appointment	Amendment
		(m)	Husband and wife	Amendment
		(p)	Social Security death payment	Amendment
1712	Trusts and similar arrangements for spouses			New
1716	Inheritance tax			
		(a)	Rate of tax	Amendment
		(e)	Compromise as to rate of future interests	Amendment

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72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
1717	Estate tax			
		(a)	Residents	Amendment
		(b)	Nonresidents of United States	Amendment
1718	Generation-skipping transfer tax			New
		(a)	Residents	New
		(b)	Nonresidents	New
		(c)	Definition	New
1730	Deductions not allowed			Amendment
1744	Source of payment			
		(e.1)	Trusts for spouses	New
1753	Penalties			
		(a)	Failure to file tax returns	Amendment
1755	Payment of generation-skipping transfer tax			New
		(a)	Person liable	New
		(b)	Filing of return	New
		(c)	Payment due	New
		(d)	Discount	New
		(e)	Interest	New
		(f)	Source of payment	New
		(g)	Place of payment	New
		(h)	Compromise with other states	New
1781	Refund of tax			
		(e)	To whom application for refund shall be made	Amendment
		(f)	Judicial review of board action	Amendment
1792	Entry without notice to department			
		(a)	Entry with bank employee	Amendment
1796	Penalties			
		(a)	Bank employees	Amendment

February 1988 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
745	Advertisement of accounts			
		(b)	Manner of advertisement	Amendment
911	Attestation of certain applications and documents			New
2204	Disclaimers, releases and charges against elective share			
		(a)	Disclaimers	Amendment
2507	Modification by circumstances			Amendment
2514	Rules of interpretation			Amendment
2515	Devise or bequest to trust			Amendment
2519	Testamentary guardian			
		(a)	Guardian of the person	Amendment
Chapter 27	Contractual Arrangements Relating to Succession			New
2701	Contracts concerning succession			New
		(a)	Establishment of contract	New
		(b)	Joint will or mutual wills	New
3154	Affidavit and oath			Amendment
		(a)	Fiduciary and witnesses	Amendment
		(b)	Subscribing witness	New
3316	Investment of funds			Amendment
3321	Nominee registration; corporate fiduciary as attorney-in-fact; deposit of securities in a clearing corporation; book-entry securities			
		(e)	Accounting for book-entry securities	Amendment
3701	Power of decedent			Technical amendment
3702	Equitable apportionment of Federal estate tax			
		(a)	General rule	Technical amendment
		(b)	Pre-residuary	Technical amendment
		(c)	Deductions	Technical amendment
		(d)	Credits	Technical amendment
3703	Apportionment of Pennsylvania inheritance tax			Amendment

February 1988 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
3706	Enforcement of contribution or exoneration of Federal estate tax			
		(c)	Suspending distribution	Amendment
Chapter 53	Pennsylvania Uniform Gifts to Minors Act			Repeal
Chapter 53	Pennsylvania Uniform Transfers to Minors Act			New
5301	Short title of chapter			New
5302	Definitions			New
5303	Scope and jurisdiction			New
		(a)	Application of chapter	New
		(b)	Jurisdiction over custodian	New
		(c)	Laws of other states	New
5304	Nomination of custodian			New
		(a)	General rule	New
		(b)	Qualification of custodian	New
		(c)	When effective	New
5305	Transfer by gift or exercise of power of appointment			New
5306	Transfer authorized by will or trust			New
		(a)	General rule	New
		(b)	Transfer to custodian	New
		(c)	Designation of custodian	New
5307	Other transfer by fiduciary			New
		(a)	Irrevocable transfer by personal representative or trustee	New
		(b)	Irrevocable transfer by guardian	New
		(c)	Additional requirements for transfer	New
5308	Transfer by obligor			New
		(a)	Irrevocable transfer for benefit of minor	New
		(b)	Transfer to custodian	New
		(c)	Transfer to minor's family or trust company	New
5309	Receipt for custodial property			New
5310	Manner of creating custodial property and effecting transfer			New
		(a)	Creation of custodial property	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Form	New
		(c)	Control of custodial property	New
5311	Single custodianship			New
5312	Validity and effect of transfer			New
		(a)	Validity of transfer	New
		(b)	Irrevocability of transfer	New
		(c)	Incorporation of provisions of this chapter	New
5313	Care of custodial property			New
		(a)	Duties of custodian	New
		(b)	Standard of care	New
		(c)	Life insurance and endowment policies	New
		(d)	Segregation of custodial property	New
		(e)	Records	New
5314	Powers of custodian			New
		(a)	General rule	New
		(b)	Liability for breach of standard of care	New
5315	Use of custodial property			New
		(a)	Without court order	New
		(b)	With court order	New
		(c)	Obligation of support not affected	New
5316	Expenses, compensation and bond of custodian			New
		(a)	Expenses	New
		(b)	Compensation	New
		(c)	Bond	New
5317	Exemption of third person from liability			New
5318	Liability to third persons			New
		(a)	Claim against custodial property	New
		(b)	Limitation on custodian's liability	New
		(c)	Limitation on minor's personal liability	New
5319	Renunciation, resignation, death or removal of custodian			New
		(a)	Renunciation	New
		(b)	Designation of trust company or adult as successor custodian	New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(c)	Resignation	New
		(d)	Ineligibility, death or incapacitation	New
		(e)	Transfer of custodial property and records to successor custodian	New
		(f)	Removal for cause	New
5320	Accounting by and determination of liability of custodian			New
		(a)	Petition	New
		(b)	Petition by successor custodian for accounting by predecessor	New
		(c)	Court order to account	New
		(d)	Court order when custodian removed	New
5321	Termination of custodianship			New
5513	Temporary guardian			Amendment
5536	Distributions of income and principal during incompetency			
		(b)	Estate plan	Amendment
5603	Implementation of power of attorney			
		(a)	Power to make gifts and power to make limited gifts	Conforming amendment
5604	Durable powers of attorney			
		(b)	Durable power of attorney not affected by disability	Amendment
5704	Notice to absentee			Amendment
6111.1	Modification by divorce			Amendment
6111.2	Effect of divorce on designation of beneficiaries			New
6114	Rules of interpretation			Amendment
7188	Annexation of account of distributed estate or trust			Amendment
7191	Separate trusts			Amendment
7315.1	Retention of cash; temporary investments			
		(b)	Temporary investments	Amendment

February 1988 Report				
72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
1702	Definitions			Amendment
1707	Transfers subject to tax			
		(c)	Inter vivos transfers	Amendment
1708	Joint tenancy			
		(b)	Husband and wife	Amendment
1709	Employment benefits			New
		(a)	Retirement benefits	New
		(b)	Other employment benefits	New
1711	Transfers not subject to tax			
		(m)	Husband and wife	Amendment
		(p)	Social Security death payment	Amendment
		(r)	Employment benefits	Repeal
1716	Inheritance tax			
		(a)	Rate of tax	Amendment
1717	Estate tax			
		(a)	Residents	Amendment
		(b)	Nonresidents of United States	Repeal
			Excluded death taxes	New
		(c)	Credit for additional inheritance tax after payment of estate tax	Amendment
1730	Deductions not allowed			Amendment
1781	Refund of tax			
		(e)	To whom application for refund shall be made	Amendment
		(f)	Judicial review of board action	Amendment

The February 1988 report also recommends the amendment of §§ 401(b) (relating to decree of court) and 403(d) (relating to injunction against disposition of property pending suit and decree rendering fraudulent transfers null and void) of the act of April 2, 1980 (P.L.63, No.26), known as the Divorce Code.⁵⁹

⁵⁹ The act of April 2, 1980 (P.L.63, No.26), known as the Divorce Code was repealed by the act of December 19, 1990 (P.L.1240, No.206). Act No. 206 of 1990 codified, among other things, provisions regarding divorce under Title 23 of the Pennsylvania Consolidated Statutes (23 Pa.C.S.).

October 1985 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
745	Advertisement of accounts			
		(b)	Manner of advertisement	Amendment
911	Attestation of certain applications and documents			New
2507	Modification by circumstances			Amendment
2514	Rules of interpretation			Amendment
Chapter 27	Contractual Arrangements Relating to Succession			New
2701	Contracts concerning succession			New
		(a)	Establishment of contract	New
		(b)	Joint will or mutual wills	New
3316	Investment of funds			Amendment
3701	Power of decedent			Technical amendment
3702	Equitable apportionment of Federal estate tax			
		(a)	General rule	Technical amendment
		(b)	Pre-residuary	Technical amendment
		(c)	Deductions	Technical amendment
		(d)	Credits	Technical amendment
3703	Apportionment of Pennsylvania inheritance tax			Amendment
3706	Enforcement of contribution or exoneration of Federal estate tax			
		(c)	Suspending distribution	Amendment
Chapter 53	Pennsylvania Uniform Gifts to Minors Act			Repeal
Chapter 53	Pennsylvania Uniform Transfers to Minors Act			New
5301	Short title of chapter			New
5302	Definitions			New
5303	Scope and jurisdiction			New
		(a)	Application of chapter	New
		(b)	Jurisdiction over custodian	New
		(c)	Laws of other states	New
5304	Nomination of custodian			New
		(a)	General rule	New
		(b)	Qualification of custodian	New

October 1985 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(c)	When effective	New
5305	Transfer by gift or exercise of power of appointment			New
5306	Transfer authorized by will or trust			New
		(a)	General rule	New
		(b)	Transfer to custodian	New
		(c)	Designation of custodian	New
5307	Other transfer by fiduciary			New
		(a)	Irrevocable transfer by personal representative or trustee	New
		(b)	Irrevocable transfer by guardian	New
		(c)	Additional requirements for transfer	New
5308	Transfer by obligor			New
		(a)	Irrevocable transfer for benefit of minor	New
		(b)	Transfer to custodian	New
		(c)	Transfer to minor's family or trust company	New
5309	Receipt for custodial property			New
5310	Manner of creating custodial property and effecting transfer			New
		(a)	Creation of custodial property	New
		(b)	Form	New
		(c)	Control of custodial property	New
5311	Single custodianship			New
5312	Validity and effect of transfer			New
		(a)	Validity of transfer	New
		(b)	Irrevocability of transfer	New
		(c)	Incorporation of provisions of this chapter	New
5313	Care of custodial property			New
		(a)	Duties of custodian	New
		(b)	Standard of care	New
		(c)	Life insurance and endowment policies	New
		(d)	Segregation of custodial property	New
		(e)	Records	New
5314	Powers of custodian			New

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20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(a)	General rule	New
		(b)	Liability for breach of standard of care	New
5315	Use of custodial property			New
		(a)	Without court order	New
		(b)	With court order	New
		(c)	Obligation of support not affected	New
5316	Expenses, compensation and bond of custodian			New
		(a)	Expenses	New
		(b)	Compensation	New
		(c)	Bond	New
5317	Exemption of third person from liability			New
5318	Liability to third persons			New
		(a)	Claim against custodial property	New
		(b)	Limitation on custodian's liability	New
		(c)	Limitation on minor's personal liability	New
5319	Renunciation, resignation, death or removal of custodian			New
		(a)	Renunciation	New
		(b)	Designation of trust company or adult as successor custodian	New
		(c)	Resignation	New
		(d)	Ineligibility, death or incapacitation	New
		(e)	Transfer of custodial property and records to successor custodian	New
		(f)	Removal for cause	New
5320	Accounting by and determination of liability of custodian			New
		(a)	Petition	New
		(b)	Petition by successor custodian for accounting by predecessor	New
		(c)	Court order to account	New
		(d)	Court order when custodian removed	New

October 1985 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5321	Termination of custodianship			New
5513	Temporary guardian			Amendment
5536	Distributions of income and principal during incompetency			
		(b)	Estate plan	Amendment
5603	Implementation of power of attorney			
		(a)	Power to make gifts and power to make limited gifts	Conforming amendment
6111.1	Modification by divorce			Amendment
6114	Rules of interpretation			Amendment
6305.1	Account form			New
		(a)	Financial institution to provide account form	New
		(b)	Form as conclusive evidence	New
7188	Annexation of account of distributed estate or trust			Amendment
7315.1	Retention of cash; temporary investments			
		(b)	Temporary investments	Amendment

The October 1985 report also recommends the repeal of the act of May 31, 1923 (P.L.468, No.256), known as the Uniform Fiduciaries Act.

March 1984 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
3155	Persons entitled			
		(b)	Letters of administration	Amendment
5500	Purpose			New
5501	Meaning of incompetent			Amendment
5510	Definitions			New
5511	Petition and hearing; examination by court-appointed physician			
		(a)	Resident	Amendment
5512.1	Determination of incompetency			New
		(a)	Findings	New
		(b)	Nature of the guardianship	New
		(c)	Legal rights retained	New

March 1984 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(d)	Review hearing	New
5514	To fill vacancy; co-guardian			Amendment
5518	Evidence of mental condition			Amendment
5521	Provisions concerning powers, duties and liabilities			Amendment
		(a)	In general	New (restructured)
		(b)	Powers and duties not granted to guardian	New
5551	Short title of subchapter			New
5552	Commonwealth Guardianship Office			New
		(a)	Creation	New
		(b)	Administrative powers and duties	New
		(c)	Powers and duties as guardian	New
5553	Undertaking guardianships			New
		(a)	Procedure	New
		(b)	Monitoring care and progress of incompetent	New
		(c)	Costs and compensation	New
		(d)	Liability of office	New
5554	Cooperation with office			New

October 1983 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
304	Application of payments made to fiduciaries			New
745	Advertisement of accounts			
		(a)	Requirement of notice; contents of notice	Amendment
		(b)	Manner of advertisement	Amendment
2514	Rules of interpretation			Amendment
3132.1	Self-proved wills			
		(a)	Proof	Amendment
		(b)	Acknowledgment and affidavits	Amendment
		(c)	Acknowledgment and affidavit taken before an attorney at law	New

October 1983 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
3301	Duty of personal representative			
		(a)	General assets	Amendment
		(b)	Real estate outside of Commonwealth	Amendment
		(c)	Time for filing	New
3501.2	Annexation of account of terminated trust, guardianship or agency			New
3502	Where filed			Amendment
3539	Change in law after pattern of distribution established			New (section previously reserved)
3540	Absentee and additional distributees			
		(a)	Distributions due absentees	Amendment
		(b)	Possibility of additional distributees	Amendment
5163.1	Distribution to personal representative			Repeal
5533.1	Account of personal representative of deceased incompetent			Repeal
6201	Right to disclaim			Amendment
6202	Disclaimers by fiduciaries or attorneys-in-fact			Amendment
6204	Filing, delivery and recording			
		(b.1)	Third party disclaimer	New
6205	Effect of disclaimer			
		(a)	In general	Amendment
		(b)	Rights of other parties	Amendment
6206	Bar to disclaimer			
		(b)	Partial acceptance within six months	Amendment
6305.1	Account form			New
		(a)	Financial institution to provide account form	New
		(b)	Form as conclusive evidence	New
7183	Notice, audit, reviews, and distribution			Amendment
7314	Common trust fund and mortgage investment fund			Amendment
7315	Retention of investments			Amendment
7315.1	Retention of cash; temporary investments			New

October 1983 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(a)	Uninvested cash	New
		(b)	Temporary investments	New

The October 1983 report also recommends the following:

- The repeal of Article XIII.1 of the act of April 9, 1929 (P.L.343, No.176), known as The Fiscal Code, insofar as it is inconsistent with the amendment of 20 Pa.C.S. § 3540.
- The amendment of subsection (a) (authorization) of § 404 (collective investment funds) of the act of November 30, 1965 (P.L.847, No.356), known as the Banking Code of 1965.

March 1981 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
2206	Right of election personal to surviving spouse			Amendment
2209	Surviving spouse as witness			Amendment
2210	Procedure for election; time limit			
		(c)	Costs	New
3101	Payments to family and funeral directors			
		(d)	Life insurance payable to estate	New
3132.1	Self-proved wills			
		(b)	Acknowledgment and affidavits	Amendment
3539	Information services			New
Chapter 37	Estate Tax Apportionment			Repeal
	Apportionment of Death Taxes			New
3701	Power of decedent			New
3702	Equitable apportionment of Federal estate tax			New
		(a)	General rule	New
		(b)	Pre-residuary	New
		(c)	Deductions	New
		(d)	Credits	New
		(e)	Election by spouse	New
		(f)	Additional Federal estate tax	New
		(g)	Present and future interests	New
		(h)	Interest and penalties	New

March 1981 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(i)	Values	New
3703	Apportionment of Pennsylvania inheritance tax			New
3704	Apportionment of Pennsylvania estate tax			New
3705	Apportionment of Federal generation-skipping tax			New
3706	Enforcement of contribution or exoneration of Federal estate tax			New
		(a)	Duty to pay	New
		(b)	Duty of fiduciary	New
		(c)	Suspending distribution	New
		(d)	Court decrees	New
4102	Powers with respect to securities and bank accounts			
		(b)	Bank accounts	Amendment
5144	Powers, duties and liabilities identical with personal representatives			Amendment
5147	Proceedings against guardian			Amendment
5153	Provisions identical to other estates			Amendment
5302	Definitions			Amendment
5303	Manner of making gift			
		(a)	General rule	Amendment
		(a.1)	Gifts by will or trust	New
		(b)	Limitations	Amendment
		(c)	Duty of donor	Amendment
5305	Duties and powers of custodian			
		(e)	Investment and retention of property	Amendment
		(f)	Disposal of property and voting securities	Amendment
		(g)	Registration, deposit and separation of property	Amendment
5308	Resignation, death or removal of custodian; bond; designation of successor custodian			
		(a)	Eligibility and designation of successor	Amendment
		(b)	When designation of successor takes effect	Amendment

March 1981 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(d)	Ineligibility, death or incapacity of custodian	Amendment
		(e)	Petition for removal or requiring bond	Amendment
5309	Accounting by custodian			
		(a)	Petition for accounting	Amendment
5536	Distributions of income and principal during incompetency			
		(a)	In general	Amendment
		(b)	Estate plan	Amendment
5537	Reserve for funeral			
		(a)	In general	Amendment
Chapter 56	Powers of Attorney			Repeal
5601	When power of attorney not affected by disability			Repeal
5602	Other powers of attorney not revoked until notice of death or disability			Repeal
		(a)	General rule	Repeal
		(b)	Affidavit of lack of knowledge of revocation	Repeal
		(c)	Construction of section	Repeal
Chapter 56	Powers of Attorney			New
5601	General provision			New
5602	Form of power of attorney			New
		(a)	Specification of powers	New
		(b)	Appointment of attorney-in-fact and successor attorney	New
		(c)	Filing of power of attorney	New
5603	Implementation of power of attorney			New
		(a)	Power to make gifts and power to make limited gifts	New
		(b)	Power to create a trust	New
		(c)	Power to make additions to an existing trust	New
		(d)	Power to claim an elective share	New
		(e)	Power to disclaim any interest in property	New
		(f)	Power to renounce fiduciary position	New
		(g)	Power to withdraw and receive	New

March 1981 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(h)	Power to authorize admission to medical facility and power to authorize medical procedures	New
5604	Durable powers of attorney			New
		(a)	Definition	New
		(b)	Durable power of attorney not affected by disability	New
		(c)	Relation of attorney-in-fact to court-appointed guardian	New
5605	Power of attorney not revoked until notice			New
		(a)	Death of principal	New
		(b)	Disability or incapacity of principal	New
5606	Proof of continuance of durable or other powers of attorney by affidavit			New
5607	Corporate attorney-in-fact			New
6102	Termination of trusts			
		(a)	Failure of original purpose	Amendment
6110	Administration of charitable estates			Amendment (restructured)
		(a)	General rule	Amendment
		(b)	Administrative termination of small charitable trusts	New
		(c)	Judicial termination of charitable trusts	New
6202	Disclaimers by fiduciaries			Amendment
7121	Grounds and procedures			Amendment
7133	Powers, duties and liabilities identical with personal representatives			Amendment
7143	Title of purchaser			Amendment
7183	Notice, audits, reviews, and distribution			Amendment
7185	Compensation			
		(b)	Allowed out of principal or income	Amendment
7186	Failure to present claim at audit			Amendment (restructured)

March 1981 Report

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
Chapter 17	Inheritance and Estate Taxes			New
1701	Short title of chapter			New
1702	Definitions			New
1703	Powers of department			New
		(a)	Rules and regulations	New
		(b)	Appraisements, allowance of deductions and assessment of tax	New
		(c)	Exercising powers vested in register	New
1706	Imposition of tax			New
1707	Transfers subject to tax			New
		(a)	General rule	New
		(b)	Transfers by will or intestacy	New
		(c)	Inter vivos transfers	New
1708	Joint tenancy			New
		(a)	General rule	New
		(b)	Husband and wife	New
		(c)	Other exception	New
1711	Transfers not subject to tax			New
		(a)	General rule	New
		(b)	Governments	New
		(c)	Charitable and fraternal organizations	New
		(d)	Life insurance	New
		(e)	War risk insurance	New
		(f)	Proceeds obtained by estates of Vietnam conflict veterans	New
		(g)	Inter vivos transfers to exempt donee	New
		(h)	Intangibles of nonresident	New
		(i)	Advancements	New
		(j)	Adjusted service certificates and bonds	New
		(k)	Property subject to power of appointment	New
		(l)	Commonwealth as statutory heir	New
		(m)	Husband and wife	New
		(n)	Nominal ownership	New
		(o)	Obligations worthless at death	New
		(p)	Social Security death payment	New

March 1981 Report

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(q)	Railroad retirement burial benefit	New
		(r)	Employment benefits	New
1716	Inheritance tax			New
		(a)	Rate of tax	New
		(b)	Computation of tax	New
		(c)	Renunciation of transfer	New
		(d)	Compromise of rights	New
		(e)	Compromise as to rate of future interests	New
		(f)	Powers of appointment	New
1717	Estate tax			New
		(a)	Residents	New
		(b)	Nonresidents of United States	New
		(c)	Credit for additional inheritance tax after payment of estate tax	New
1721	Valuation			New
		(a)	General rule	New
		(b)	Valuation of life interest	New
		(c)	Valuation of interest for term credit	New
		(d)	Annuity or life estate terminated within nine months of decedent's death	New
		(e)	Valuation of future interest	New
		(f)	Valuation of property subject to option or agreement	New
1722	Valuation of certain farmland			New
		(a)	Definitions	New
		(b)	General rule	New
		(c)	Imposition of tax when use abandoned	New
		(d)	Separation, split-off or transfer	New
1726	Deductions generally			New
1727	Expenses			New
1728	Taxes			New
1729	Liabilities			New
		(a)	General rule	New
		(b)	Debt based upon contract or agreement	New
		(c)	Secured loan	New

March 1981 Report

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(d)	Joint obligation	New
		(e)	Support contract	New
		(f)	Legacy in discharge of decedent's obligation	New
		(g)	Outlawed debt	New
		(h)	Pledge to exempt transferee	New
		(i)	Liability for tort or as accommodation party	New
		(j)	Married person's obligations	New
		(k)	Medical expenses	New
1730	Deductions not allowed			New
1736	Returns			New
		(a)	Persons responsible for returns	New
		(b)	Inclusion of property	New
		(c)	Supplemental returns	New
		(d)	Time for filing return	New
		(e)	Form of returns	New
		(f)	Place for filing returns	New
1737	Appraisalment			New
1738	Deductions			New
1739	Assessment of tax			New
1740	Notice			New
1741	Failure to file returns not a bar to assessment of tax			New
1742	Payment date and discount			New
1743	Interest			New
1744	Source of payment			New
		(a)	Outright devisees and bequests	New
		(b)	Outright preresiduary gifts	New
		(c)	In trust preresiduary gifts passing by will	New
		(d)	In trust preresiduary gift passing by inter vivos trusts	New
		(e)	Transfer for limited period	New
		(f)	Other transfers	New
1745	Estate tax			New
		(a)	Persons liable	New
		(b)	Filing of return	New
		(c)	Payment date	New
		(d)	Discount	New
		(e)	Interest	New
		(f)	Source of payment	New
		(g)	Place of payment	New

March 1981 Report

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
1746	Deduction and collection of tax by personal representative or other fiduciary			New
1747	Duties of depositories			New
1748	Compromise by department			New
1749	Interstate compromise and arbitration of inheritance taxes			New
1750	Extension of time for payment			New
1751	Bond for delinquent tax			New
1752	Evidence of payment of tax for real estate in another county			New
1753	Penalties			
		(a)	Failure to file tax returns	New
		(b)	Failure to give notice of death of depositor	New
		(c)	False returns	New
1756	Short title of subchapter			New
1757	Compromise agreement and filing, interest or penalty for nonpayment of taxes			New
1758	Arbitration agreement			New
1759	Arbitration board			New
		(a)	Powers of board	New
		(b)	Hearings	New
		(c)	Majority vote	New
		(d)	Determination of domicile	New
		(e)	Compensation and expenses	New
1760	Filing and determination of domicile and other documents			New
1761	Interest or penalties for nonpayment of taxes			New
1762	Compromise by parties to arbitration agreement			New
1763	Reciprocal application			New
1766	Timely mailing treated as timely filing and payment			New
1767	Lien and duration of lien			New
1768	Limited and future interests			New
1769	Purchaser, mortgagee or lessee			New
1770	Sale by fiduciary			New

March 1981 Report

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
1771	Sale by heir, devisee or fiduciary			New
1772	Sale of property transferred inter vivos			New
1773	Subordination of lien			New
1774	Cessation upon approval of board			New
1775	Release of lien			New
		(a)	No tax due	New
		(b)	Other security	New
		(c)	Partial payment	New
		(d)	Department's certificate conclusive evidence of release	New
1776	Enforcement procedure			New
		(a)	Citation	New
		(b)	Decrees	New
		(c)	When citation issuable	New
		(d)	Subpoenas	New
		(e)	Property subject to execution	New
		(f)	Reciprocity with other states	New
1781	Refund of tax			New
		(a)	When refunds will be made	New
		(b)	Interest	New
		(c)	Form of refund	New
		(d)	Time for claiming refund	New
		(e)	To whom application for refund shall be made	New
		(f)	Judicial review of board action	New
		(g)	Appropriation	New
1786	Protest, notice and appeal			New
		(a)	General rule	New
		(b)	Future interests	New
		(c)	Farmland	New
1787	Bond			New
1788	Appeal and removal from department			New
		(a)	General rule	New
		(b)	Future interests	New
1791	Entry prohibited			New
1792	Entry without notice to department			New
		(a)	Entry with bank employee	New

March 1981 Report				
72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Entry with representative of department	New
		(c)	Entry under court order	New
		(d)	Entry into box used by business firm	New
		(e)	Entry into box to remove will and cemetery deed	New
1793	Entry upon notice to department			New
		(a)	General rule	New
		(b)	Notice to department	New
		(c)	Exoneration of financial institution	New
1794	Subsequent entries			New
1795	Confidential nature of contents			New
1796	Penalties			New
		(a)	Bank employees	New
		(b)	Other persons	New
		(c)	Disclosure of confidential information	New

The March 1981 report also recommends the following:

- The repeal of the act of April 7, 1826 (P.L.227, No.72), regarding collateral inheritances.
- The repeal of the act of May 11, 1901 (P.L.173, No.139), regarding inheritance tax.
- The repeal of § 12 of the act of June 20, 1919 (P.L.521, No.258), regarding the transfer of property.
- The repeal of the act of May 4, 1927 (P.L.727, No.375), regarding the transfer of property.
- The repeal of the act of May 8, 1929 (P.L.1673, No.531), regarding refunds.
- The repeal of the act of May 23, 1949 (P.L.1726, No.528), known as Uniform Act on Interstate Compromise and Arbitration of Inheritance Taxes.
- The amendment of § 491(1) of the act of April 12, 1951 (P.L.90, No.21), known as the Liquor Code.
- The repeal of the act of June 15, 1961 (P.L.373, No.207), known as the Inheritance and Estate Tax Act of 1961.

May 1980 Report

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
Part III	Adoption			New
Chapter 21	Preliminary Provisions			New
2101	Short title of part			New
2102	Definitions			New
Chapter 23	Jurisdiction and Parties			New
2301	Court			New
2302	Venue			New
2311	Who may be adopted			New
2312	Who may adopt			New
2313	Representation of child			New
Chapter 25	Proceedings Prior to Petition to Adopt			New
2501	Relinquishment to agency			New
		(a)	Petition	New
		(b)	Consents	New
2502	Relinquishment to adult intending to adopt child			New
		(a)	Petition	New
		(b)	Consents	New
2503	Hearing			New
		(a)	General rule	New
		(b)	Notice	New
		(c)	Decree	New
2511	Grounds for involuntary termination			New
		(a)	General rule	New
		(b)	Other considerations	New
2512	Petition for involuntary termination			New
		(a)	Who may file	New
		(b)	Contents	New
		(c)	Father not identified	New
2513	Hearing			New
		(a)	Time	New
		(b)	Notice	New
		(c)	Mother competent witness on paternity issue	New
		(d)	Decree	New
2521	Effect of decree of termination			New
		(a)	Adoption proceeding rights extinguished	New
		(b)	Award of custody	New
		(c)	Authority of agency or person receiving custody	New

May 1980 Report

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
2531	Report of intention to adopt			New
		(a)	General rule	New
		(b)	Contents	New
		(c)	When report not required	New
2532	Filing of report			New
2533	Report of intermediary			New
		(a)	General rule	New
		(b)	Contents	New
2534	Exhibits			New
2535	Investigation			New
		(a)	General rule	New
		(b)	Matters covered	New
		(c)	Payment of costs	New
Chapter 27	Petition for Adoption			New
2701	Contents of petition for adoption			New
2702	Exhibits			New
2711	Consents necessary to adoption			New
		(a)	General rule	New
		(b)	Husband of natural mother	New
2712	Consents not naming adopting parents			New
2713	When other consents not required			New
2714	When consent of parent not required			New
2721	Notice of hearing			New
2722	Place of hearing			New
2723	Attendance at hearing			New
2724	Testimony and investigation			New
		(a)	Testimony	New
		(b)	Investigation	New
		(c)	Payment of investigation costs	New
2725	Religious belief			New
Chapter 29	Decrees and Records			New
2901	Time of entry of decree of adoption			New
2902	Requirements and form of decree of adoption			New
		(a)	General rule	New
		(b)	Withdrawal or dismissal of petition	New
2903	Retention of parental status			New

May 1980 Report				
23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
2904	Name of adoptee			New
2905	Impounding of proceedings			New
2906	Docket entries			New
2907	Certificate of adoption			New
2908	Foreign decree of adoption			New
Part IX	Miscellaneous Provisions			New
Chapter 83	Legitimacy of Children			New
8302	Acknowledgment of paternity			New
8303	Claim of paternity			New

The May 1980 report also recommends the repeal of the following:

- The act of July 9, 1935 (P.L.612, No.214), regarding adoption.
- Section 4 of the act of July 30, 1947 (P.L.1180, No.491), regarding adoption.
- Section 6 of the act of August 26, 1953 (P.L.1411, No.400), regarding adoption.
- The act of July 24, 1970 (P.L.620, No.208), known as the Adoption Act.

May 1979 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
761	Petitions			Amendment
2102	Share of surviving spouse			Amendment
2203	Right of election; resident decedent			
		(a)	Property subject to election	Amendment
2204	Disclaimers, releases and charges against elective share			
		(c)	Charges against elective share	Amendment
3101	Payments to family			Amendment (restructured)
		(a)	Wages, salary or employee benefits	Amendment (restructured)
		(b)	Deposit account	New
		(c)	Payments to funeral directors	New
3133	Limit of time for probate			
		(c)	Effect upon grantee or mortgagee	Amendment
3153	Contents of petition			Amendment
3174	When not required			

May 1979 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(b)	Resident personal representative	Repeal
			Instances when bond not required	New
		(b.1)	Nonresident co-personal representative	Repeal
		(c)	Nonresident personal representative	Repeal
		(d)	Estates under \$5,000	Repeal
3539	Information services			New
3540	Absentee and additional distributees			New
		(a)	Distributions due absentees	New
		(b)	Possibility of additional distributees	New
3543	Interest or income on distributive shares			Amendment
		(a)	Pecuniary legacy	Amendment
		(c)	Demonstrative legacy	Amendment
6102	Termination of trusts			
		(a)	Failure of original purpose	Amendment
6109	Combination of charitable trusts			Repeal
7183	Notice, audits, reviews and distribution			Amendment
7187	Interest or income on distributive shares			Amendment
7192	Combination of trusts			Amendment

June 1977 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
712	Nonmandatory exercise of jurisdiction through orphans' court division			Amendment
726	Venue of nonprofit corporations			New
727	Venue of cemetery companies			New
2101	Intestate descent			Amendment
2102	Share of surviving spouse			Amendment

June 1977 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
2103	Shares of others than surviving spouse			Amendment
2104	Rules of succession			Amendment
2105	Spouse's rights			Amendment
2111	Procedure to establish title to real property when spouse claims entire estate			Repeal
Chapter 22	Elective Share of Surviving Spouse			New
2201	Definition of conveyance			New
2202	Right of election; nonresident decedent			New
2203	Right of election; resident decedent			New
		(a)	Property subject to election	New
		(b)	Property not subject to election	New
2204	Disclaimers, releases and charges against elective share			New
		(a)	Disclaimers	New
		(b)	Conveyances and releases	New
		(c)	Charges against elective share	New
		(d)	Definition of "beneficial interest"	New
		(e)	Conditional decree	New
2205	Transfers for value excluded			New
2206	Right of election personal to surviving spouse			New
2207	Waiver of right to elect			New
2208	Forfeiture of right of election; desertion; nonsupport; slaying			New
2209	Surviving spouse as witness			New
2210	Procedure for election; time limit			New
		(a)	How election made	New
		(b)	Time limit	New
2211	Determination of effect of election; enforcement			New
		(a)	Power of court of domicile	New
		(b)	Effect of election	New
		(c)	Enforcement	New
		(d)	Restraining orders	New

June 1977 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(e)	Protection of fiduciaries, custodians and obligors	New
		(f)	Transferees and lienholders for value	New
2508	Change by election of surviving spouse			Repeal
2509	Forfeiture of right of election			Repeal
2510	How election made			Repeal
2511	Time for making election			Repeal
2512	Failure to make an election			Repeal
2513	Grantee or lienholder			Repeal
3162	Advertisement of grant of letters			Amendment
5116	Orphan beneficiaries, charitable uses or trusts; administration, cities of first class			Amendment
5161	When accounting filed			Amendment
5163	Notice, audits, reviews and distribution			Amendment
5531	When accounting filed			Amendment
5533	Notice, audits, reviews and distribution			Amendment
6101	Definitions			Amendment
6102	Termination of trusts			
		(a)	Failure of original purpose	Amendment
6104	Rule against perpetuities			
		(d)	Applicability	New
6111	Conveyances to defeat marital rights			Repeal
6111.1	Modification by divorce			New
7181	When account filed			Amendment
8109	Disposition of natural resources			Amendment

November 1975 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
102	Definitions			Amendment
712	Nonmandatory exercise of jurisdiction through orphans' court division			Amendment

November 1975 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
908	Appeals			
		(a)	When allowed	Amendment
		(b)	Bond	Amendment
2101	Intestate descent			Repeal
2101.1	Intestate estate			New
2102	Share of surviving spouse			Repeal
2102.1	Share of the spouse			New
2103	Shares of others than surviving spouse			Amendment
2104	Rules of descent			Amendment
2105	Spouse's rights			
		(a)	Widow	Amendment
		(b)	Surviving husband	Amendment
2106	Forfeiture			
		(a)	Husband's share	Amendment
		(b)	Wife's share	Repeal
2108	Adopted person			Amendment
2109	Advancements			Repeal
2109.1	Advancements			New
2111	Procedure to establish title to real property when spouse claims entire estate			Repeal
2112	Property distributable to the Commonwealth			Repeal
2113	Limitation of claims			Repeal
2114	Personal estate of nonresident			Repeal
Chapter 22	Elective Share of Surviving Spouse			New
2201	Definition of conveyance			New
2202	Right of election; nonresident decedent			New
2203	Right of election; resident decedent			New
		(a)	Property subject to election	New
		(b)	Property not subject to election	New
2204	Disclaimers, releases and charges against elective share			New
		(a)	Disclaimers	New
		(b)	Conveyances and releases	New
		(c)	Charges against elective share	New
		(d)	Definition of "beneficial interest"	New
		(e)	Conditional decree	New

November 1975 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
2205	Transfers for value excluded			New
2206	Right of election personal to surviving spouse			New
2207	Waiver of right to elect			New
2208	Forfeiture of right of election; desertion; nonsupport; slaying			New
2209	Surviving spouse as witness			New
2210	Procedure for election; time limit			New
		(a)	How election made	New
		(b)	Time limit	New
2211	Determination of effect of election; enforcement			New
		(a)	Power of court of domicile	New
		(b)	Effect of election	New
		(c)	Enforcement	New
		(d)	Restraining orders	New
		(e)	Protection of fiduciaries, custodians and obligors	New
		(f)	Transferees and lienholders for value	New
2501	Who may make a will			
		(a)	Persons 18 or older	Amendment
2507	Modification by circumstances			Amendment
2508	Change by election of surviving spouse			Repeal
2509	Forfeiture of right of election			Repeal
		(a)	By husband	Repeal
		(b)	By wife	Repeal
2510	How election made			Repeal
2511	Time for making election			Repeal
2512	Failure to make an election			Repeal
		(a)	Effect	Amendment
2513	Grantee or lienholder			Amendment and Repeal ⁶⁰
2514	Rules of interpretation			Amendment
2520	Personal estate of nonresident			Repeal
3101	Payment of wages, salary, vacation benefits to family			Amendment (restructured)

⁶⁰ The November 1975 report provides mutually exclusive recommendations regarding § 2513: the amendment of this section (*see* 1975 Senate Bill No. 1144) and its repeal (*see* 1975 Senate Bill No. 1142).

November 1975 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
		(a)	Wages, salary or employee benefits	Amendment (restructured)
		(b)	Deposit account	New
3174	When not required			
		(a)	Corporate personal representative	Amendment
		(b)	Resident executor	Amendment
		(b.1)	Nonresident co-personal representative	New
		(c)	Nonresident executor	Amendment
3357	Title of purchaser			
		(a)	General rule	Amendment
3376	Limitations against debt due estate			Amendment
3532	At risk of personal representative			
		(c)	Record of risk distributions	New
3703	General rules			
		(a)	Powers of testator or settlor	Amendment
5163.1	Distribution to personal representative			New
5536	Distributions of income and principal during incompetency			Amendment (restructured)
		(a)	In general	Amendment (restructured)
		(b)	Estate plan	New
5701	Proof of death			
		(e)	Distribution of an estate or trust	New
6101	Definitions			Amendment
6102	Termination of trusts			
		(a)	Failure of original purpose	Amendment
6103	Release or disclaimer of powers or interests			
		(a)	Powers and interests releasable	Amendment
6111	Conveyances to defeat marital rights			Repeal
6111.1	Modification by divorce			New
6114	Rules of interpretation			Amendment
6118	Invalidity of certain gifts			Repeal
Chapter 62	Disclaimers			New
6201	Right to disclaim			New
6202	Disclaimers by fiduciaries			New

November 1975 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
6203	Interests subject to disclaimer			New
6204	Filing, delivery and recording			New
		(a)	Will or intestacy	New
		(b)	Inter vivos transfers	New
		(c)	Powers of appointment	New
		(d)	Real estate	New
6205	Effect of disclaimer			New
		(a)	In general	New
		(b)	Rights of other parties	New
		(c)	Powers of appointment	New
6206	Bar to disclaimer			New
		(a)	Acceptance	New
		(b)	Partial acceptance within six months	New
		(c)	Partial acceptance after six months	New
6207	Other statutes			New
Chapter 63	Multiple-Party Accounts			New
6301	Definitions			New
6302	Applicability of chapter			New
6303	Ownership during lifetime			New
		(a)	Joint account	New
		(b)	Trust account	New
6304	Right of survivorship			New
		(a)	Joint account	New
		(b)	Trust account	New
		(c)	Other cases	New
		(d)	Change by will prohibited	New
6305	Form of account			New
6306	Accounts and transfers nontestamentary			New
7183	Notice, audits, reviews, and distribution			Amendment
7188	Annexation of account of distributed estate or trust			New
8111	Expenses; trust estates			
		(d)	(no subsection heading)	Amendment

September 1974 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5501	Meaning of incompetent			Amendment
5511	Petition and hearing			
		(a)	Resident	Amendment
		(c)	Contents of petition	New
		(d)	Rights of an alleged incompetent	New
		(e)	Dismissal of petition	New
5512	County of appointment			
		(a)	Resident incompetent	Amendment
5515	Provisions similar to other estates			Amendment
5517	Adjudication of competency			Amendment (restructured)
		(a)	Adjudication of competency	Amendment (restructured)
		(b)	Review of guardianship	New
		(c)	Request for review	New
5519	Scope of decree; extent of guardian's powers and duties			New
		(a)	In general	New
		(b)	Limited guardianship of the person	New
		(c)	Standards	New
5519.1	Selection of guardians			New
5526	Powers and duties of a guardian of the person			New
		(a)	In general	New
		(b)	Care and protection of incompetent	New
		(c)	Report	New
		(d)	Authority of court	New
		(e)	Abortion or sterilization	New
5527	Compensation of guardians			New
5531	When accounting filed			Amendment

The September 1974 report also recommends the following regarding the act of October 20, 1966 (3rd Sp. Sess., P.L.96, No.6), known as the Mental Health and Mental Retardation Act of 1966:

- The amendment of § 102 (definitions).
- The addition of § 306 (county administrator for the mentally retarded; appointment; powers and duties).

May 1973 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
711	Mandatory exercise of jurisdiction through orphans' court division in general			Amendment
712	Nonmandatory exercise of jurisdiction through orphans' court division			Amendment
721	Venue of decedents' and minors' estates			Amendment
779	Nonsuits			New
		(a)	In general	New
		(b)	Will contest	New
		(c)	Other cases	New
908	Appeals			
		(d)	Excepted appeals	Amendment
922	Inventories and appraisements			Amendment
925	Affidavits of death			New
2106	Forfeiture			
		(c)	Slayer's share	Amendment
2501	Who may make a will			
		(b)	Persons in military service and mariners	Repeal
2502	Form and execution of a will			Amendment
2503	Nuncupative wills			Repeal
		(a)	When permissible	Repeal
		(b)	Property disposable	Repeal
		(c)	Effect on prior will	Repeal
2504	Witnesses			Repeal
		(a)	General rule	Repeal
		(b)	Foreign execution	Repeal
2504.1	Validity of execution			New
2507	Modification by circumstances			Amendment
2510	How election made			Amendment
3101	Payment of wages, salary, vacation benefits to family			Amendment (restructured)
		(a)	Wages, salary or employee benefits	Amendment (restructured)
		(b)	Deposit account	New
3102	Settlement of small estates on petition			Amendment
3121	When allowable			Amendment
3122	Payment or delivery of exemption			
		(b)	Property set aside for minors	Amendment

May 1973 Report

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
3132	Manner of probate			Amendment
3133	Limit of time for probate			
		(a)	Original probate	Amendment
3134	Nuncupative wills			Repeal
3351	Power to sell			Amendment
3353	Order of court			Amendment
3356	Purchase by personal representative			Amendment
3376	Limitations against debt due estate			Amendment
3531	Estates not exceeding \$5,000			Amendment
Chapter 43	Temporary Fiduciaries			New
4301	Appointment of temporary fiduciary			New
4302	Petition for relief; joinder of parties; notice			New
4303	Security by substituted fiduciaries; duties and responsibilities			New
4304	Duration of decree; impeachment of acts			New
4305	Fiduciaries temporarily relieved of duties and liabilities			New
4306	Power to control, remove, discharge and settle accounts			New
5101	When guardian unnecessary			Amendment
5103	Sequestered deposit			New
5153	Provisions identical to other estates			Amendment
5154	Title of purchaser			Amendment
5155	Order of court			New
5302	Definitions			Amendment
5303	Manner of making gift			
		(a)		Amendment
5305	Duties and powers of custodian			
		(d)		Amendment
		(g)		Amendment
5308	Resignation, death or removal of custodian; bond; designation of successor custodian			
		(d)		Amendment
5501	Meaning of incompetent			Amendment

May 1973 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
5505	Provisions similar to small estates of minors' estates			Amendment
5511	Petition and hearing			Amendment
		(a)	Resident	Amendment
		(c)	Court appointed physician	New
5515	Provisions similar to other estates			Amendment
5521	Provisions concerning powers, duties and liabilities			Amendment
5533.1	Account of personal representative of deceased incompetent			New
5536	Distributions of income and principal during incompetency			Amendment (restructured)
		(a)	In general	Amendment (restructured)
		(b)	Estate plan	New
Chapter 56	Powers of Attorney			New
5601	When power of attorney not affected by disability			New
5602	Other powers of attorney not revoked until notice of death or disability			New
		(a)	General rule	New
		(b)	Affidavit of lack of knowledge of revocation	New
		(c)	Construction of section	New
6103	Release or disclaimer of powers or interests			
		(b)	Form of release or disclaimer	Amendment
6111	Conveyances to defeat marital rights			
		(d)	Procedure	Amendment
6119	Invalidity of certain gifts			Repeal and New ⁶¹
7302	Authorized investments; in general			
		(b)	Prudent man rule	Amendment
7310	Stocks			
		(a)	Preferred and common stock	Amendment

⁶¹ The May 1973 provides mutually exclusive recommendations regarding the invalidity of certain gifts: the addition of § 6118/6119 (*see* 1973 Senate Bill No. 777) and the repeal of § 6119 (*see* 1973 Senate Bill No. 775).

May 1973 Report				
20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation
7319	Directions of testator or settlor			
		(b)	Exception; failure of purpose	Amendment
Chapter 82	Revised Price Act			Repeal
Chapter 83	Inalienable Property			New
8301	Powers of court to authorize sale, etc. of real property			New
8302	Venue where real property is wholly in one county			New
8303	Venue where real property is in more than one county			New
8304	Procedure			New
8305	Sale of real property subject to future inalienable interests; disposition of proceeds			New
8306	Title of purchaser			New
Chapter 84 Subch. A	Fiduciaries in Military Service			Repeal
8604	Manner of executing anatomical gifts			
		(d)		Amendment

The May 1973 report also recommends the repeal of the following acts:

- Act of February 17, 1818 (P.L.104, Ch.LII.) (trustees).
- Act of March 22, 1825 (P.L.107, Ch.LXI.) (trusts).
- Act of April 14, 1828 (P.L.453, No.193) (trusts and trustees).
- Act of March 21, 1831 (P.L.192, No.103) (assignees).
- Act of March 15, 1832 (P.L.135, No.80) (registers and registers' courts).
- Act of June 14, 1836 (P.L.628, No.175) (assignees and other trustees).
- Act of March 17, 1838 (P.L.80, No.32) (assignees and trustees).
- Act of April 13, 1840 (P.L.319, No.140) (orphans' courts).
- Act of July 27, 1842 (P.L.436, No.126) (creditors).
- Act of April 29, 1844 (P.L.527, No.342) (registers).
- Act of April 10, 1848 (P.L.448, No.322) (court jurisdiction and powers).
- Act of March 14, 1849 (P.L.164, No.142) (sales by fiduciaries).
- Act of March 14, 1850 (P.L.195, No.163) (trustee conveyances).
- Act of April 25, 1850 (P.L.569, No.347) (miscellaneous).
- Act of March 27, 1854 (P.L.214, No.183) (suits by creditors).
- Act of April 30, 1855 (P.L.386, No.408) (assignees).
- Act of May 3, 1855 (P.L.415, No.438) (assignees).
- Act of April 17, 1856 (P.L.386, No.403) (suits in dower and partition).
- Act of March 22, 1859 (P.L.207, No.209) (orphans' courts).
- Act of May 1, 1861 (P.L.431, No.403) (executors and administrators).
- Act of May 1, 1861 (P.L.680, No.641) (executors and trustees).

- Act of March 27, 1865 (P.L.44, No.30) (trustees).
- Act of April 17, 1866 (P.L.111, No.101) (trustees).
- Act of April 9, 1868 (P.L.785, No.726) (trustees).
- Act of February 26, 1869 (P.L.4, No.3) (partitions).
- Act of April 13, 1869 (P.L.28, No.28) (orphans' courts).
- Act of May 17, 1871 (P.L.269, No.250) (assignees).
- Act of May 23, 1874 (P.L.222, No.144) (transfer of stocks and loans).
- Act of April 28, 1876 (P.L.50, No.41) (sales and conveyances).
- Act of May 13, 1876 (P.L.172, No.136) (partitions).
- Act of February 16, 1877 (P.L.3, No.1) (trusts).
- Act of March 24, 1877 (P.L.39, No.36) (private sales of real estate).
- Act of May 22, 1878 (P.L.83, No.105) (deeds and conveyances of real estate).
- Act of May 8, 1889 (P.L.123, No.134) (trusts and trustees).
- Act of April 22, 1891 (P.L.25, No.21) (grants and conveyances).
- Act of June 3, 1893 (P.L.273, No.242) (sureties and trustees).
- Act of June 16, 1893 (P.L.464, No.334) (partitions).
- Act of June 24, 1895 (P.L.248, No.158) (sureties).
- Act of April 4, 1901 (P.L.66, No.34) (private sales of real estate).
- Act of May 11, 1901 (P.L.174, No.141) (initiation of actions).
- Act of May 21, 1901 (P.L.271, No.178) (recorders of deeds and registers of wills).
- Act of June 7, 1901 (P.L.513, No.249) (sale of lands).
- Act of May 28, 1907 (P.L.271, No.207) (sureties).
- Act of June 1, 1907 (P.L.384, No.279) (sureties).
- Act of May 3, 1909 (P.L.391, No.220) (accounts).
- Act of April 27, 1911 (P.L.101, No.93) (assignment of judges).
- Act of July 21, 1913 (P.L.871, No.421) (private sales of real estate).
- Act of April 2, 1915 (P.L.43, No.30) (conveyance of real estate).
- Act of April 10, 1915 (P.L.112, No.50) (sales and mortgages).
- Act of April 23, 1915 (P.L.177, No.99) (codification and revision of decedents' estates laws).
- Act of May 14, 1915 (P.L.494, No.209) (appraisements and titles).
- Act of May 28, 1915 (P.L.633, No.272) (appraising and setting aside of property).
- Act of April 5, 1917 (P.L.45, No.26) (appraising and setting aside of property).
- Act of April 5, 1917 (P.L.46, No.27) (investing in farm loan bonds).
- Act of June 7, 1917 (P.L.337, No.187), known as the Orphans' Court Partition Act of 1917.
- Act of June 7, 1917 (P.L.415, No.191) (registers of wills).
- Act of July 11, 1917 (P.L.790, No.297) (coal-mining leases).
- Act of July 11, 1917 (P.L.803, No.306) (registers of wills).
- Act of July 18, 1917 (P.L.1067, No.350) (appraisements and titles).
- Act of July 19, 1917 (P.L.1126, No.384) (titles to real estate).
- Act of June 4, 1919 (P.L.372, No.183) (orphans' court).
- Act of July 7, 1919 (P.L.726, No.291) (guardians).
- Act of July 8, 1919 (P.L.736, No.299) (orphans' court).
- Act of July 10, 1919 (P.L.886, No.350) (desertion).

- Act of April 11, 1921 (P.L.121, No.71) (orphans' court).
- Act of May 24, 1921 (P.L.1075, No.397) (orphans' court).
- Act of June 27, 1923 (P.L.846, No.326) (division of real estate).
- Act of March 29, 1927 (P.L.72, No.51) (guardians' sales of real estate).
- Act of April 4, 1929 (P.L.149, No.150) (guardians of minors).
- Act of March 11, 1933 (P.L.11, No.8) (sales of real estate).
- Act of April 26, 1933 (P.L.88, No.56) (compromise or settlement).
- Act of July 15, 1935 (P.L.1025, No.338) (trust funds).
- Act of May 26, 1939 (P.L.230, No.132) (sales of real estate).
- Act of June 24, 1939 (P.L.871, No.374) (liability).
- Act of April 18, 1945 (P.L.253, No.113) (guardians).
- Act of January 9, 1952 (P.L.1861, No.500) (orphans' court).
- Act of June 3, 1953 (P.L.278, No.52) (legal instruments).
- Act of July 29, 1953 (P.L.968, No.233) (orphans' court).
- Act of February 28, 1956 (P.L.1154, No.359), known as the Incompetents' Estates Act of 1955.
- Act of August 8, 1961 (P.L.969, No.433) (register of wills).
- Act of August 6, 1963 (P.L.508, No.265) (orphans' court).
- Act of August 14, 1963 (P.L.842, No.411) (conveyances of real estate).
- Act of June 16, 1972 (No.124) (miscellaneous).
- Act of June 16, 1972 (No.140) (miscellaneous).
- Act of December 6, 1972 (No.288) (anatomical gifts).
- Act of December 28, 1972 (No.356) (gifts for charitable and religious purposes).

January 1972 Report		
20 Pa.C.S. Section	Heading	Recommendation
Title 20 -- Chapters 1-88 (§§ 101-8815)	Probate, Estates and Fiduciaries Code	New

The January 1972 report also recommends numerous repeals.⁶²

⁶² Details regarding the proposed organizational structure of 20 Pa.C.S. and the specific acts or parts of acts recommended for repeal appear *infra* pp. 255-273.

Pre-Codification Advisory Committee Reports

The following tables summarize the general content of the Advisory Committee reports that were published before the 1972 consolidation of decedents' estates laws into the PEF Code.⁶³

1970 Report: Proposed Adoption Act
<p><i>Preliminary Provisions</i>⁶⁴ <i>Jurisdiction; Parties</i>, including (A) Jurisdiction⁶⁵ and (B) Parties⁶⁶ <i>Proceedings Prior to Petition to Adopt</i>, including (A) Voluntary Relinquishment,⁶⁷ (B) Involuntary Termination,⁶⁸ (C) Decree of Termination⁶⁹ and (D) Report of Intention to Adopt; Report of Intermediary; Investigation⁷⁰ <i>Petition for Adoption</i>, including (A) Petition,⁷¹ (B) Consents⁷² and (C) Hearings⁷³ <i>Decrees; Effect Thereof; Records</i>⁷⁴</p>

1963 Report: Inheritance and Estate Tax Act of 1961, As Amended
<p>Amendments to the Inheritance and Estate Tax Act of 1961, including:</p> <ul style="list-style-type: none">• The act of September 21, 1961 (P.L.1571, No. 660), adding a new § 907 (Appropriation)• The act of April 23, 1963 (P.L.21, No.18), amending § 1101 (Safe Deposit Box of a Decedent; Definition)• The act of July 26, 1963 (P.L.325, No.178), amending §§ 102 (Definitions), 213 (Presumed Decedent), 718 (Source of Payment) and 805 (Sale by Heir or Devisee)

⁶³ Not listed in these tables are provisions regarding repeals, applicability, effective dates, severability and saving clauses.

⁶⁴ Short Title; Definitions.

⁶⁵ Court; Venue.

⁶⁶ Who May Be Adopted; Who May Adopt.

⁶⁷ Relinquishment to Agency; Relinquishment to Adult Intending to Adopt Child; Hearing.

⁶⁸ Grounds for Involuntary Termination; Petition for Involuntary Termination; Hearing.

⁶⁹ Effect of a Decree of Termination.

⁷⁰ Report of Intention to Adopt; Filing of Report; Report of Intermediary; Exhibits; Investigation.

⁷¹ Contents of Petition; Exhibits.

⁷² Consents Necessary to Adoption; Consents Not Naming Adopting Parents; When Consent Not Required - In General; When Consent Not Required - Parent.

⁷³ Notice; Place of Hearing; Attendance at Hearing; Testimony and Investigation; Religious Belief.

⁷⁴ Time of Entry of Decree; Requirements and Form of Decree; Retention of Parental Status; Name of Adoptee; Impounding of Proceedings; Docket Entries; Report to the Department of Public Welfare; Certificate of Adoption; Foreign Decree.

1959 Report: Proposed Inheritance and Estate Tax Act of 1959

*Preliminary Provisions*⁷⁵

*Transfers Subject to Tax*⁷⁶

*Transfers Not Subject to Tax*⁷⁷

*Rate of Tax*⁷⁸

*Valuation, including (A) Valuation*⁷⁹

*Deductions, including (A) In General,*⁸⁰ (B) Expenses - Deductible,⁸¹ (C) Taxes,⁸²
(D) Liabilities - Deductible,⁸³ (E) Not Deductible⁸⁴ and (F) Deductible - Future Interests -
Costs⁸⁵

*Returns - Determination of Tax - Payment of Tax, including (A) Inheritance Tax,*⁸⁶ (B) Estate
Tax,⁸⁷ (C) Duties of Personal Representatives, Transferees, and Depositories;⁸⁸ (D) Tax
Compromise - Arbitration - Alleged Nonresident;⁸⁹ (E) Bond - Future Interests;⁹⁰ (F) Bond
- Delinquent Tax,⁹¹ (G) Evidence of Payment of Tax⁹² and (H) Failure to File Returns -
False Returns⁹³

(continued)

⁷⁵ Short Title; Definitions; Powers of Secretary of Revenue and Regulations.

⁷⁶ See the contents listed in the June 1958 Report. The only change from that report is under (C), where “Consideration and Quantum of Taxable Transfer” replaces “Generally.”

⁷⁷ See the contents listed in the June 1958 Report.

⁷⁸ See the contents listed in the June 1958 Report.

⁷⁹ Valuation Date, Property Valued and In General; Valuation of Life Interest; Valuation of Interest for Term Certain; Valuation of Limited Estate and Yearly Income; Annuity or Life Tenancy Terminated Within Year of Decedent’s Death; Valuation Date and Future Interest; Valuation of Property Subject to Option or Agreement and Closely Held Business Interest.

⁸⁰ See the contents listed in the June 1958 Report.

⁸¹ See the contents listed in the June 1958 Report.

⁸² State and Foreign Death Taxes; Federal Estate Tax; Other Taxes.

⁸³ Liabilities of the Decedent - In General; Debts Based on Contract or Agreement - In General; Secured Loan; Joint Obligation; Support Contract; Legacy in Discharge of Decedent’s Obligation; Outlawed Debt; Pledge to Exempt Transferee; Liability as Accommodation Party or for Tort; Married Women’s Obligations.

⁸⁴ Spouse’s Allowance; Claims Under Marital or Support Agreement With Former or Surviving Spouse; Litigation Expenses; Foreign Obligations.

⁸⁵ Costs.

⁸⁶ Persons Liable for Return; Supplemental Returns; Time for Filing Return; Form of Return; Place for Filing Returns; Appraisal; Deductions; Assessment of Tax; Notice; Failure to File Not a Bar to Assessment of Tax; Payment Date; Payment Date - Future Interest; Payment Date - Future Interest - Year of Decedent’s Death - Contingencies; Payment Date - Future Interest - Payment After Year from Decedent’s Death - Contingencies; Effect of Election by Fiduciary; Discount; Interest; Source of Payment; Place of Payment; General Powers of Secretary of Revenue.

⁸⁷ Persons Liable; Filing of Return, Time, Place and Assessment of Tax; Payment Date; Discount; Interest; Source of Payment; Place of Payment.

⁸⁸ See the contents listed in the June 1958 Report.

⁸⁹ See the contents listed in the June 1958 Report.

⁹⁰ See the contents listed in the June 1958 Report.

⁹¹ See the contents listed in the June 1958 Report.

⁹² See the contents listed in the June 1958 Report.

⁹³ Failure to File Tax Returns; Failure to Give Notice of Death of Depositor; False Returns - Misdemeanor.

1959 Report: Proposed Inheritance and Estate Tax Act of 1959

Collection of Tax, including (A) Lien of Tax,⁹⁴ and (B) Enforcement - Procedure⁹⁵
*Refund of Tax - Overpayment*⁹⁶
Disputed Tax, including (A) Appeals and Protests⁹⁷
Entry into Safe Deposit Box, including (A) Entry Prohibited,⁹⁸ (B) Entry Without Written Notice to Department of Revenue Permitted,⁹⁹ (C) Entry Upon Written Notice to Department of Revenue,¹⁰⁰ (D) Subsequent Entries,¹⁰¹ (E) Confidential Nature of Contents of Safe Deposit Box¹⁰² and (F) Penalties¹⁰³

Note: The 1959 report also recommends the repeal of a number of acts or parts of act, including, but not limited to, the Transfer Inheritance Tax Act of 1919, the Estate Tax Act of 1927 and provisions of the Fiscal Code.

June 1958 Report: Proposed Inheritance and Estate Tax Act of 1959

*Preliminary Provisions*¹⁰⁴
Transfers Subject to Tax, including (A) In General,¹⁰⁵ (B) Transfers by Will and Intestacy,¹⁰⁶ (C) Inter Vivos Transfers¹⁰⁷ and (D) Joint Ownership¹⁰⁸

(continued)

⁹⁴ Lien - Duration; Limited and Future Interests; Sale to Purchaser, Mortgagee or Lessee; Sale by Fiduciary; Sale by Heir or Devisee; Sale of Property Transferred Inter Vivos; Subordination of Lien; Cessation Upon Approval of Bond; Release of Lien - No Tax Due; Release of Lien - Other Security; Release of Lien - Partial Payment.

⁹⁵ Citation; Decrees; Citation - When Issuable; Subpoenas; Property Subject to Execution; Reciprocity with Other States.

⁹⁶ See the contents listed in the June 1958 Report.

⁹⁷ Appeals and Protest; Bond; Appeal and Removal from Department of Revenue.

⁹⁸ Safe Deposit Box of a Decedent and Definition; Entry Into Safe Deposit Box; Interpretation.

⁹⁹ Entry Into Safe Deposit Box With Bank Employee; Entry Into Safe Deposit Box With Representative of Department of Revenue; Entry Into Safe Deposit Box Under Court Order; Entry Into Safe Deposit Box to Remove Will and Cemetery Deed.

¹⁰⁰ Entry Into Safe Deposit Box After Notice to Department of Revenue; Notice to Department of Revenue; Exoneration of Financial Institution.

¹⁰¹ Subsequent Entries Into Safe Deposit Box.

¹⁰² Confidential Information.

¹⁰³ Penalties - Other Than Bank Employees; Penalties - Bank Employees; Disclosure of Confidential Information.

¹⁰⁴ Short Title; Definitions.

¹⁰⁵ Imposition of Tax.

¹⁰⁶ Will or Intestacy - Resident; Will or Intestacy - Nonresident; Presumed Decedent.

¹⁰⁷ Generally; Contemplation of Death; Deferred Possession and Enjoyment; Reservation of Life Interest; Reservation of Reversionary Interest; Promise by Transferee; Revocable and Tentative Trusts.

¹⁰⁸ Joint Tenancy.

June 1958 Report: Proposed Inheritance and Estate Tax Act of 1959

*Transfers Not Subject to Tax*¹⁰⁹

Rate of Tax, including (A) Inheritance Tax,¹¹⁰ (B) Estate Tax - Residents,¹¹¹ (C) Estate Tax - Nonresidents¹¹² and (D) Estate Tax - General¹¹³

Appraisal - Valuation, including (A) Appraisal¹¹⁴ and (B) Valuation¹¹⁵

Deductions, including (A) In General,¹¹⁶ (B) Expenses - Deductible,¹¹⁷ (C) Taxes,¹¹⁸ (D) Liabilities - Deductible¹¹⁹ and (E) Not Deductible¹²⁰

Returns - Payment of Tax, including (A) Inheritance Tax,¹²¹ (B) Estate Tax,¹²² (C) Duties of Personal Representatives,¹²³ (D) Tax Compromise - Arbitration,¹²⁴ (E) Bond - Future Interests,¹²⁵ (F) Bond - Delinquent Tax,¹²⁶ (G) Evidence of Payment of Tax¹²⁷ and (H) Failure to File Returns - False Returns¹²⁸

(continued)

¹⁰⁹ Governments; Charities; Life Insurance; War Risk Insurance; Inter Vivos Transfers to Exempt Donee; Intangibles of Nonresident; Advancements; Adjusted Service Bonds and Service Certificates; Appointed Property; Commonwealth; Husband and Wife; Nominal Ownership; Obligations Worthless at Death; Social Security Death Payment; Railroad Retirement Burial Benefit; Employment Benefits.

¹¹⁰ Method of Computation of Tax - Residents; Method of Computation of Tax - Nonresidents; Rate of Tax - Class A; Rate of Tax - Class B; Rate of Tax - Joint Interests; Renunciation of Transfer; Compromise of Rights; Powers of Appointment.

¹¹¹ When Federal Credit Not Exhausted.

¹¹² When Federal Credit Not Exhausted.

¹¹³ Additional Inheritance Tax After Payment of Estate Tax; Credit.

¹¹⁴ Appraisal - Supervision by Secretary of Revenue; Notice of Appraisal.

¹¹⁵ Valuation Date - In General; Valuation of Life Interests; Valuation of Interests for Terms Certain; Valuation of Limited Estates and Yearly Income; Annuity or Life Tenancy Terminated Within Year of Decedent's Death; Valuation Date and Future Interests.

¹¹⁶ In General.

¹¹⁷ Administration Expenses; Bequest to Fiduciary or Attorney in Lieu of Fees; Family Exemption; Funeral and Burial Expenses; Tombstones and Gravemarkers; Burial Trusts or Contracts; Bequests for Religious Services.

¹¹⁸ Property Taxes; Death Taxes.

¹¹⁹ Liabilities of the Decedent - In General; Debts Based on Contract or Agreement - In General; Secured Loans; Joint Obligation; Support Contracts; Legacies in Discharge of Decedent's Obligations; Outlawed Debts; Claims of Surviving Spouse; Pledge to Exempt Transferee; Liability as Accommodation Party or for Tort; Married Women's Obligations.

¹²⁰ Spouse's Allowance; Distribution Contracts; Litigation Expenses; Foreign Obligations; Insurance.

¹²¹ Persons Liable for Return; Time for Filing Return; Form of Return; Place for Filing Returns; Payment Date; Payment Date - Future Interest; Payment Date - Future Interest - Year of Decedent's Death - Contingencies; Payment Date - Future Interest - Payment After Year from Decedent's Death - Contingencies; Effect of Election by Fiduciary; Discount; Interest; Source of Payment; Place of Payment.

¹²² Persons Liable; Filing of Return, Time and Place; Payment Date; Discount; Interest; Source of Payment; Place of Payment.

¹²³ Deduction and Collection of Tax; Duties of Depositories.

¹²⁴ Compromise by Attorney General; Uniform Act on Interstate Compromise and Arbitration of Inheritance Taxes.

¹²⁵ When Required; Filing.

¹²⁶ When Required; Filing.

¹²⁷ Real Estate in Another County.

¹²⁸ Failure to File Tax Returns; Failure to Give Notice of Death of Depositor; False Returns - Misdemeanor; Transfer of Stock.

June 1958 Report: Proposed Inheritance and Estate Tax Act of 1959

Collection of Tax, including (A) Lien of Tax,¹²⁹ (B) Transfers of Securities¹³⁰ and (C) Enforcement - Procedure¹³¹
*Refund of Tax - Overpayment*¹³²
Disputed Tax, including (A) Appeals¹³³ and (B) Inheritance Tax Board¹³⁴
Entry into Safe Deposit Box, including (A) Permission to Enter Safe Deposit Box,¹³⁵ (B) Penalties¹³⁶ and (C) Definitions¹³⁷

Note: The June 1958 report also recommends the repeal of a number of acts or parts of act, including, but not limited to, the Transfer Inheritance Tax Act of 1919, the Estate Tax Act of 1927 and provisions of the Fiscal Code.

July 1955 Report: Omnibus Amendments Regarding Decedents' Estates Laws

Intestate Act of 1947	Share of Surviving Spouse Spouses' Allowance; Procedure Procedure to Establish Title to Real Property When Spouse Claims Entire Estate Property Distributable to the Commonwealth
Wills Act of 1947	Witnesses Modification by Circumstances Change by Election of Surviving Spouse Failure to Make an Election Rules of Interpretation Testamentary Guardian
(continued)	

¹²⁹ Lien - Duration; Limited and Future Interests; Sale to Bona Fide Purchaser, Mortgagee or Lessee; Sale by Fiduciary; Sale by Heir or Devisee; Sale Prior to Death of Transferor or Property Transferred Inter Vivos; Subordination of Lien; Cessation on Approval of Bond; Release of Lien - No Tax Due; Release of Lien - Other Security; Release of Lien - Partial Payment.

¹³⁰ Transfers - Corporate Stock and Registered Bonds.

¹³¹ Citations; Decrees; Citations - When Issuable; Subpoenas; Property Subject to Execution; Reciprocity with Other States.

¹³² When Refunds Will Be Made; Interest; Form of Refund; Time for Claiming Refund.

¹³³ Appeal from Appraisements; Appeal from Allowance or Disallowance of Deduction; Bond; Appeal and Removal from Inheritance Tax Board.

¹³⁴ Inheritance Tax Board; Powers of Board; Subpoenas.

¹³⁵ Entry into Safe Deposit Boxes Prohibited; Permission to Enter Safe Deposit Box; Form of Request; Failure of Department of Revenue to Fix Time for Entry Into Safe Deposit Box; Entry Into Safe Deposit Box to Remove Will and Cemetery Deeds; Entry Into Safe Deposit Box with Bank Official.

¹³⁶ Penalties.

¹³⁷ Person; Safe Deposit Box of a Decedent.

July 1955 Report: Omnibus Amendments Regarding Decedents' Estates Laws	
Estates Act of 1947	Termination of Trusts Release or Disclaimer of Powers or Interests Income Accumulations - When Valid Income Accumulations; Disposition When Invalidity Occurs Disposition of Valid Income Accumulations Disposition of Invalid Income Accumulations Powers of Appointment; Rights of Surviving Spouse
Fiduciaries Act of 1949	Definitions Payment of Wages or Salary to Family Settlement of Small Estates on Petition When Allowable Proper County Duty of Personal Representative Valuations; Appraisers Supplemental Inventory Objections to Inventory Statute of Limitations; Claims Not Barred at Death Estates Not Exceeding One Thousand Dollars At Risk of Personal Representative Award to Nonresident Beneficiary Presumption of Payment, Release or Extinguishment Notice, Audits, Reviews and Distribution When Guardian Unnecessary In General
Act of May 14, 1929 (P.L.1721, No.563)	Title and §§ 1-3
Act of May 7, 1935 (P.L.130)	Title and §§ 1-3
Fiduciaries Investment Act of 1949	Stocks Interest-Bearing Deposit
Banking Code	§§ 1109.2, 1109.3, 1109.4, 1109.5 and 1109.6
Register of Wills Act of 1951	Wills Probated Outside the Commonwealth
Incompetents' Estates Act of 1951	Enactment with an amendment to the section "Award Upon Final Confirmation of Account"
Orphans' Court Act of 1951	Title Definitions Exclusive Jurisdiction Concurrent Jurisdiction Testimony in Proceedings Removed From Register Jury Trial Trials in the Orphans' Court
Orphans' Court Partition Act of 1917	(Repeal)

1951 Report: Incompetents' Estates Act of 1951, Register of Wills Act of 1951, Orphans' Court Act of 1951 and Estate Tax Administration Act of 1951		
Incompetents' Act of 1951	See November 1950 Report ¹³⁸	
Register of Wills Act of 1951	See July 1950 Report ¹³⁹	
Orphans' Court Act of 1951	See May 1950 Report ¹⁴⁰	
Estate Tax Apportionment Act of 1951	Definitions Equitable Apportionment General Rules	Method of Apportionment Enforcement of Contribution or Exoneration

November 1950 Report: Proposed Incompetents' Estates Act of 1951	
<i>Preliminary Provisions</i> ¹⁴¹ <i>Small Estates</i> ¹⁴² <i>Guardian: Appointment, Bond, Removal and Discharge; Evidence</i> , including (A) Appointment, ¹⁴³ (B) Bond, ¹⁴⁴ (C) Removal and Discharge, ¹⁴⁵ and (D) Evidence ¹⁴⁶	
(continued)	

¹³⁸ The only differences in structure are as follows. In the article "Accounts, Audits, Reviews, Distribution - Rights of Incompetent and Distributees":

- In (B) ("Audits"), the following sections are eliminated: "Confirmation of Account and Approval of Proposed Distribution," "Audits in Counties Having Separate Orphans' Court," and "Audits in Counties Having No Separate Orphans' Court." In addition, the following two sections are added: "Confirmation of Accounts" and "Decree of Distribution."
- In (E) ("Rights of Incompetent and Distributees"), the following section is eliminated: "Transcripts of Balances Due by Guardian."

¹³⁹ The only differences in structure are in the article "Letters - Accounts": a section is added ("Revocation of Letters"), and two sections are eliminated ("Revocation of Letters of Administration" and "Revocation of Letters Testamentary").

¹⁴⁰ The only differences in structure are as follows:

- In (B) ("Sheriff") of the article "Clerk; Sheriff," a new section is added ("Money Paid Into Court").
- In (B) ("Notice") of the article "Procedure," the section "Service of Notice" is replaced by the section "Manner of Service; Proof."
- In (E) ("Witnesses; Evidence; Hearings; Trials), the section "Jury Trial" replaces "Jury Trial - When Available," and two sections are eliminated ("Will Contest" and "Determination of Incompetency").

¹⁴¹ Short Title; Definitions; Title to Real and Personal Estate.

¹⁴² When Guardian Unnecessary; Power of Person or Institution Maintaining Incompetent.

¹⁴³ Petition and Hearing; County of Appointment; Nonresident Guardian.

¹⁴⁴ Necessity, Form and Amount; Fiduciary Estate; When Bond Not Required; Requiring or Changing Amount of Bond.

¹⁴⁵ Grounds for Removal; Procedure for and Effect of Removal; Adjudication of Competency; Discharge of Guardian and Surety.

¹⁴⁶ Evidence of Mental Condition.

November 1950 Report: Proposed Incompetents' Estates Act of 1951
<p><i>Guardians: Powers, Duties and Liabilities</i>, including (A) In General¹⁴⁷ and (B) Sales, Mortgages, Leases, Options and Exchanges¹⁴⁸</p> <p><i>Property Rights and Obligations of Estates of Incompetents</i>, including (A) Control of Actions¹⁴⁹ and (B) Claims; Rights of Creditors¹⁵⁰</p> <p><i>Accounts, Audits, Reviews, Distribution - Rights of Incompetent and Distributees</i>, including (A) Accounts,¹⁵¹ (B) Audits,¹⁵² (C) Review,¹⁵³ (D) Distribution,¹⁵⁴ and (E) Rights of Incompetent and Distributees¹⁵⁵</p> <p><i>Foreign Guardians</i>, including (A) Powers and Duties,¹⁵⁶ (B) Distribution to Foreign Fiduciaries,¹⁵⁷ and (C) Transfer of Administration¹⁵⁸</p>

July 1950 Report: Proposed Register of Wills Act of 1951	
<p>Preliminary Provisions¹⁵⁹</p> <p>Jurisdiction and Powers¹⁶⁰</p> <p>Probate¹⁶¹</p>	<p>Letters - Accounts¹⁶²</p> <p>Records and Certified Copies¹⁶³</p>

¹⁴⁷ Possession of Real and Personal Property; Inventory; Abandonment of Property; Liability Insurance; Continuation of Business; Incorporation of Business; Claims Against Co-Guardians; Proceeding Against Guardian; Revival of Judgment Against Guardian; Liability of Guardian on Contracts; Investments; Power of Attorney; Voting Stock by Proxy; Nominee Registration and Corporate Fiduciary as Attorney-in-Fact; Acceptance of Deed in Lieu of Foreclosure; Compromise of Controversies; When Guardian Dies or Becomes Incompetent; Surviving or Remaining Guardians; Disagreement Among Guardians; Inherent Powers and Duties.

¹⁴⁸ Power to Sell Personal Property; Power to Lease; Order of Court; Restraint of Sale; Purchase by Guardian; Title of Purchaser; Collateral Attack; Record of Proceedings and County Where Real Estate Lies.

¹⁴⁹ Substitution of Guardian in Pending Action or Proceedings; Death or Removal of Guardian.

¹⁵⁰ Effect of Determination of Incompetency; Specific Performance of Contracts; Notice to Commonwealth and Political Subdivisions.

¹⁵¹ Accounting Required; Where Filed; Notice to Parties in Interest.

¹⁵² Audits in Counties Having Separate Orphans' Court; Audits in Counties Having No Separate Orphans' Court; Confirmation of Accounts; Recognition of Claims; Statement of Proposed Distribution; Decree of Distribution.

¹⁵³ Rehearing; Relief Granted.

¹⁵⁴ Award Upon Final Confirmation of Account; Recording and Registering Decrees Awarding Real Estate.

¹⁵⁵ Liability of Guardian for Interest; Transcripts of Balances Due By Guardian, Disposition of Trust Income; Distributions of Income and Principal During Incompetency.

¹⁵⁶ In General; Security Transfers; Service of Process; Proof of Authority in Court Proceedings; Effect of Local Proceedings.

¹⁵⁷ To Foreign Personal Representative; To Foreign Trustee, Guardian or Committee.

¹⁵⁸ Award to Foreign Guardian When Incompetent Becomes a Nonresident.

¹⁵⁹ Short Title; Definitions.

¹⁶⁰ Register's Jurisdiction; Deputy Register; Witnesses - Testimony; Witness Fees; Enforcement of Subpoenas, Orders and Costs; Caveat; Certification of Records to Court; Appeals; Bill of Costs.

¹⁶¹ Place of Probate; Manner of Probate; Limit of Time for Probate; Nuncupative Wills; Wills in Foreign Language; Wills Probated Outside the Commonwealth; Enforcing Production of Will.

¹⁶² Bonds of Personal Representatives; Revocation of Letters of Administration; Revocation of Letters Testamentary; Transmission of Accounts to the Court.

¹⁶³ Wills; Inventories and Appraisements; Certified Copies; Recording Proceedings in Another County.

May 1950 Report: Proposed Orphans' Court Act of 1951	
<i>Preliminary Provisions</i> ¹⁶⁴ <i>Organization of Orphans' Court</i> ¹⁶⁵ <i>Jurisdiction</i> ¹⁶⁶ <i>Judges</i> ¹⁶⁷ <i>Clerk - Sheriff</i> , including (A) Clerk ¹⁶⁸ and (B) Sheriff ¹⁶⁹ <i>Masters, Auditors, Examiners, Guardians Ad Litem and Trustees Ad Litem</i> ¹⁷⁰ <i>Procedure</i> , including (A) Institution of Proceedings and Original Process; ¹⁷¹ (B) Notice; ¹⁷² (C) Action Upon Default of Respondent; ¹⁷³ (D) Summary Decree - Injunction; ¹⁷⁴ (E) Witnesses; Evidence; Hearings; Trials; ¹⁷⁵ (F) Enforcement of Orders and Decrees; ¹⁷⁶ (G) Costs; ¹⁷⁷ and (H) Appeals ¹⁷⁸	

1949 Report: Fiduciaries Act of 1949 and Fiduciaries Investment Act of 1949	
Fiduciaries Act of 1949	<i>Preliminary Provisions</i> ¹⁷⁹ <i>Dispositions Independent of Letters</i> , including (A) Wages or Salary;
(continued)	

¹⁶⁴ Short Title; Definitions.

¹⁶⁵ Orphans' Court in Every County; Counties Having Separate Orphans' Courts; Counties Having No Separate Orphans' Court; Court of Record and Seal; Sessions and Terms; Rules.

¹⁶⁶ Exclusive Jurisdiction; Concurrent Jurisdiction - Title to Real Estate; Conflict of Laws; Incidental Powers; Venue of Decedents' and Minors' Estates; Venue of Trust Estates; Situs of Testamentary Trust; Situs of Inter Vivos Trust; Change of Situs - Order of Court.

¹⁶⁷ Powers; Sitting in Other Courts; Powers When the Court Is Not in Session; When President Judge Unable to Act.

¹⁶⁸ Duties; Dockets; Bill of Costs; Translation of Foreign Language Documents; Advertisement of Accounts; Money Paid Into Court.

¹⁶⁹ Powers and Duties; Fees.

¹⁷⁰ Appointment and Purpose; Compensation; Subpoenas; Power to Administer Oaths.

¹⁷¹ Petitions; Accounts; Writs of Habeas Corpus; Citation; Issue and Service of Citation; Proof of Service.

¹⁷² Service of Notice.

¹⁷³ Power of Court.

¹⁷⁴ Decree Without Prior Hearing - Attachment - Sequestration; Injunctions.

¹⁷⁵ Subpoenas; Depositions and Discovery; Perpetuation of Testimony and Court Records; Testimony in Proceedings Removed from Register; Jury Trial - When Available; Trials in the Orphans' Court; Will Contest; Determination of Incompetency.

¹⁷⁶ Methods of Enforcement; Procedure on Attachment of the Person; Procedure on Sequestration of Real or Personal Property; Procedure on Execution on Personal Property; Procedure on Attachment Execution; Procedure on Execution on Real Estate.

¹⁷⁷ Allowance and Allocation.

¹⁷⁸ Right of Appeal; Effect of Appeal; Disposition of Cases on Appeal.

¹⁷⁹ Short Title; Definitions; Title to Personal Estate; Title to Real Estate.

1949 Report: Fiduciaries Act of 1949 and Fiduciaries Investment Act of 1949	
Fiduciaries Act of 1949	<p>Small Estates¹⁸⁰ and (B) Family Exemption¹⁸¹</p> <p><i>Personal Representative; Appointment, Bond, Removal and Discharge</i>, including (A) Grant of Letters,¹⁸² (B) Bond,¹⁸³ and (C) Removal and Discharge¹⁸⁴</p> <p><i>Inventory and Appraisalment</i>¹⁸⁵</p> <p><i>Personal Representatives; Powers, Duties and Liabilities</i>, including (A) In General¹⁸⁶ and (B) Sales, Pledges, Mortgages, Leases, Options and Exchanges¹⁸⁷</p> <p><i>Property Rights and Obligations of Estates of Decedents</i>, including (A) Abatement, Survival and Control of Actions¹⁸⁸ and (B) Claims; Charges; Rights of Creditors¹⁸⁹</p>
(continued)	

¹⁸⁰ Payment of Wages or Salary to Family; Settlement of Small Estates on Petition.

¹⁸¹ When Allowable; Payment or Delivery of Exemption; Payment from Real Estate; Income; Other Remedies; Grantee or Lienholder.

¹⁸² Proper County; When Twenty-One Years Elapsed; Contents of Petition; Affidavit; Persons Entitled; Persons Not Qualified; Nonresidents; Letters of Administration c.t.a.; Letters of Administration d.b.n. or d.b.n.c.t.a.; Letters of Administration Durante Minoritate, Durante Absentia, and Pendente Lite; Oath of Personal Representative.

¹⁸³ Individual Estate; Fiduciary Estate; When Not Required; Requiring or Changing Amount of Bond.

¹⁸⁴ Grounds for Removal; Procedure for and Effect of Removal; Discharge of Personal Representative and Surety.

¹⁸⁵ Duty of Personal Representative; Valuations and Appraisers; Supplemental Inventory; Claims Against Personal Representative.

¹⁸⁶ Possession of Real and Personal Estate and Exception; Renunciation of Right to Administer Property; Liability Insurance; Continuation of Business; Incorporation of Decedent's Business; Investment of Funds; Claims Against Co-Fiduciary; Revival of Judgments Against Personal Representative; Power of Attorney; Voting Stock by Proxy; Nominee Registration and Corporate Fiduciary as Attorney-in-Fact; Acceptance of Deed in Lieu of Foreclosure; Compromise of Controversies; Death of Fiduciary; Incompetence of Personal Representative; Administrator c.t.a.; Administrator d.b.n. and d.b.n.c.t.a.; Surviving or Remaining Personal Representatives; Disagreement of Personal Representatives; Effect of Revocation of Letters, Probate of Will, Later Will or Codicil; Notice of Devise or Bequest to Corporation or Association; Liability of Personal Representatives on Contracts; Inherent Powers and Duties.

¹⁸⁷ Power to Sell; Power to Lease; Order of Court; Power Given in Will; Restraint of Sale; Purchase by Personal Representative; Title of Purchaser; Collateral Attack; Record of Proceedings and County Where Real Estate Lies.

¹⁸⁸ Actions Which Survive; Substitution of Personal Representative in Pending Action or Proceedings; Action By or Against Personal Representative; Death or Removal of Fiduciary; Abatement of Action for Failure to Take Out Letters; Limitations Against Debt Due Estate; Execution on Judgments.

¹⁸⁹ Liens and Charges Existing at Death Not Impaired; Judgments Which Are Liens at Death; Statute of Limitations - Claims Not Barred at Death; Notice of Claim; Limitation Upon Claims; Failure to Present Claim at Audit; Claims Not Due - Certain to Become Due; Claims Not Certain to Become Due; Claims Subject to Litigation in Other Courts; Specific Performance of Contracts; Proceeding Against Personal Representative; Classification and Order of Payment; Notice to Commonwealth and Political Subdivisions.

1949 Report: Fiduciaries Act of 1949 and Fiduciaries Investment Act of 1949	
Fiduciaries Act of 1949	<p><i>Accounting and Distribution in Decedents' Estates</i>, including (A) Accounts,¹⁹⁰ (B) Audits,¹⁹¹ (C) Review,¹⁹² (D) Distribution,¹⁹³ and (E) Rights of Distributees¹⁹⁴</p> <p><i>Legacies, Annuities and Other Charges</i>¹⁹⁵</p> <p><i>Trust Estates</i>, including (A) Appointment of Trustees;¹⁹⁶ (B) Bond of Trustees;¹⁹⁷ (C) Removal and Discharge;¹⁹⁸ (D) Powers, Duties and Liabilities of Trustees;¹⁹⁹ (E) Sales, Pledges, Mortgages, Leases, Options and Exchanges;²⁰⁰ (F) Accounts; Audits; Reviews; Distribution;²⁰¹ and (G) Separation and Combination of Trusts²⁰²</p> <p><i>Minors</i>, including (A) Small Estate;²⁰³ (B) Appointment of Guardian;²⁰⁴ (C) Bond;²⁰⁵ (D) Removal and Discharge;²⁰⁶ (E) Powers, Duties, and Liabilities - In General;²⁰⁷</p>
(continued)	

¹⁹⁰ Accounting Required; Where Filed; Notice to Parties in Interest; Representation of Parties in Interest.

¹⁹¹ Audits in Counties Having Separate Orphans' Court; Audits in Counties Having No Separate Orphans' Court; Statement of Proposed Distribution; Confirmation of Account and Approval of Proposed Distribution.

¹⁹² Rehearing and Relief Granted.

¹⁹³ Estates Not Exceeding One Thousand Dollars; At Risk of Personal Representative; Award Upon Final Confirmation of Account; Distribution in Kind; Delivery and Possession of Real Estate; Recording and Registering Decrees Awarding Real Estate.

¹⁹⁴ Order of Abatement; Contribution; Interest or Income on Distributive Shares; Liability of Personal Representative for Interest; Transcripts of Balances Due by Personal Representative; Determination of Title to Decedent's Interest in Real Estate.

¹⁹⁵ Enforcement of Payment; Discharge of Portion of Property from Charges Payable in the Future; Discharge of Property from Lien of Charge; Presumption of Payment, Release or Extinguishment.

¹⁹⁶ To Fill Vacancy; Nonresident Trustee; Resident Co-Trustee.

¹⁹⁷ Necessity, Form and Amount; Requiring or Changing Amount of Bond.

¹⁹⁸ Grounds and Procedure.

¹⁹⁹ Possession of Real and Personal Property; Abandonment of Property; Liability Insurance; Continuation of Business; Incorporation of Business; Claims Against Co-Trustee; Proceeding Against Trustee; Revival of Judgments Against Trustee; Liability of Trustee on Contracts; Investments; Power of Attorney; Voting Stock by Proxy; Nominee Registration and Corporate Fiduciary as Attorney-in-Fact; Acceptance of Deed in Lieu of Foreclosure; Compromise of Controversies; When Trustee Dies or Becomes Incompetent; Substituted or Succeeding Trustee; Surviving or Remaining Trustees; Disagreement Among Trustees; Effect of Removal, or of Probate of Later Will or Codicil; Inherent Powers and Duties.

²⁰⁰ Power to Sell; Power to Lease; Order of Court; Power in the Trust Instrument; Restraint of Sale; Purchase by Trustee; Title of Purchaser; Collateral Attack; Record of Proceedings and County Where Real Estate Lies.

²⁰¹ When Account Filed; Where Accounts Filed; Notice, Audit, Reviews and Distribution; Disposition of Minor's Income.

²⁰² Separate Trusts; Combination of Trusts.

²⁰³ When Guardian Unnecessary; Power of Natural Guardian.

²⁰⁴ County of Appointment; Persons Not Qualified to be Appointed by the Court; Persons Preferred in Appointment; Nonresident Guardian.

²⁰⁵ Necessity, Form and Amount; When Bond Not Required; Requiring or Changing Amount of Bond.

²⁰⁶ Grounds and Removal.

²⁰⁷ Possession of Real and Personal Property; Inventory; Those Identical with Trustees; Inherent Powers and Duties; Guardian Named in Conveyance.

1949 Report: Fiduciaries Act of 1949 and Fiduciaries Investment Act of 1949	
Fiduciaries Act of 1949	<p>(F) Sales, Pledges, Mortgages, Leases, Options and Exchanges;²⁰⁸ and (G) Accounts; Audits; Reviews; Distribution²⁰⁹</p> <p><i>Foreign Fiduciaries</i>, including (A) Powers and Duties,²¹⁰ (B) Distributions to Foreign Fiduciaries²¹¹ and (C) Transfer of Administration²¹²</p> <p><i>Absentees and Presumed Decedents</i>²¹³</p> <p><i>Sureties</i>, including (A) Rights in Administration²¹⁴ and (B) Enforcement of Bond²¹⁵</p>
Fiduciaries Investment Act of 1949	<p>Definition of Fiduciary</p> <p>Authorized Investments</p> <p>Government Obligations</p> <p>Obligations of Federal Organizations</p> <p>Obligations of Pennsylvania Governmental Organizations</p> <p>Corporate Bonds</p> <p>Mortgages</p> <p>Fractional Interest in Mortgages</p> <p>Stocks</p> <p>Real Estate</p> <p>Ground Rent</p> <p>Interest-Bearing Deposit</p> <p>Common Trust Fund and Mortgage Investment Fund</p> <p>Retention of Unauthorized Investments</p> <p>Life Insurance, Building and Loan Shares, and Similar Assets</p> <p>Investments Which Become Unauthorized</p> <p>Court Direction</p> <p>Directions of Testator or Settlor</p>

²⁰⁸ Power to Sell Personal Property; Power to Lease; Order of Court; Restraint of Sale; Purchase by Guardian; Title of Purchaser; Collateral Attack; Record of Proceedings and County Where Real Estate Lies.

²⁰⁹ When Accounting Filed; Where Accounts Filed; Notice, Audits, Reviews and Distribution; Distributions for Support and Education; Notice to Guardian or Guardian Ad Litem; Death of Minor.

²¹⁰ In General; Stock Transfers; Service of Process; Proof of Authority in Court Proceedings; Effect of Local Proceedings.

²¹¹ To Foreign Personal Representative; To Foreign Trustee, Guardian or Committee.

²¹² Award to Foreign Guardian When Minor Becomes a Nonresident.

²¹³ Proof of Death; Trustee for Absentee; Distribution of Property of Absentee; Notice to Absentee; Search for Absentee.

²¹⁴ Agreement Concerning Deposit of Assets; Notice; Participation in Administration; Information from Fiduciary - Accounting; Release of Surety Before Discharge of Fiduciary.

²¹⁵ Suits on Bond; Nonresident Surety.

January 1949 Report: Proposed Fiduciaries Investment Act of 1949	
Definition of Fiduciary Authorized Investments Government Obligations Obligations of Federal Organizations Obligations of Pennsylvania Governmental Organizations Corporate Bonds Mortgages Fractional Interest in Mortgages Stocks Real Estate	Ground Rent Interest-Bearing Deposit Common Trust Fund and Mortgage Investment Fund Retention of Unauthorized Investments Life Insurance, Building and Loan Shares, and Similar Assets Investments Which Become Unauthorized Court Direction Directions of Settlor

1947 Report: Intestate Act of 1947, Wills Act of 1947, Estates Act of 1947 and Principal and Income Act of 1947	
Intestate Act of 1947	Intestate Descent Share of Surviving Spouse Shares of Others Than Surviving Spouse Rules of Descent Spouse's Rights Forfeiture Illegitimates Adopted Persons Advancements Spouse's Allowance - Procedure Procedure to Establish Title to Real Estate When Spouse Claims Entire Estate Property Distributable to the Commonwealth Limitation of Claims Personal Estate of Non-Resident
Wills Act of 1947	Who May Make a Will Form and Execution of a Will Nuncupative Wills Witnesses Revocation of a Will Revival of Revoked or Invalid Will Modification by Circumstances Change by Election of Surviving Spouse Forfeiture of Right of Election How Election Made Time for Making Election Failure to Make an Election Grantee or Lienholder Rules of Interpretation
(continued)	

1947 Report: Intestate Act of 1947, Wills Act of 1947, Estates Act of 1947 and Principal and Income Act of 1947	
Wills Act of 1947 (continued)	Devise in Fee Tail Abolished Rule in Shelley's Case Alienage Testamentary Guardian Personal Estate of Non-Resident
Estates Act of 1947	Definitions Termination of Trusts Release or Disclaimer of Powers or Interests Rule Against Perpetuities Rule Against Perpetuities - Disposition When Invalidity Occurs Income Accumulations - When Valid Disposition of Valid Income Accumulations Disposition of Invalid Income Accumulations Combination of Charitable Trusts Administration of Charitable Trusts Powers of Appointment - Rights of Surviving Spouse Spendthrift Trusts Limited Estates in Personalty and in the Proceeds of the Conversion of Real Estate Rules of Interpretation Estates Pur Autre Vie Estates in Fee Tail Abolished Rule in Shelley's Case
Principal and Income Act of 1947	Definition of Terms Application of the Act; Powers of Settlor Income and Principal; Disposition Apportionment of Income Corporate Dividends and Share Rights Premium and Discount Bonds Principal Used in Business Principal Comprising Animals Disposition of Natural Resources Interest-Bearing Obligations in Default Expenses; Trust Estates Expenses; Non-Trust Estates

June 1946 Report: Proposed Wills Act of 1947	
Who May Make a Will Form and Execution of a Will Revocation and Revival of a Will Modification by Circumstances Change by Election of Surviving Spouse Rules of Interpretation	Devise in Fee Tail Abolished Rule in Shelley's Case Alienage Testamentary Guardian Personal Estate of Non-Resident

March 1946 Report: Proposed Intestate Act of 1947

Intestate Descent Rules of Descent Dower and Curtesy Forfeiture of Spouses' Share Illegitimates Adopted Persons Advancements	Spouse's Allowance - Procedure Procedure to Establish Title to Real Estate When Spouse Claims Entire Estate Property Distributable to the Commonwealth Limitation of Claims Personal Estate of Non-Resident
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PROPOSED LEGISLATION ORGANIZED BY STATUTORY SECTION

The following includes each section and subsection of the Pennsylvania Consolidated Statutes to which the Advisory Committee on Decedents' Estates Laws recommended the amendment or repeal of an existing statutory provision or the addition of a new provision. The reference to the specific Advisory Committee report or reports containing the recommendation is also provided.²¹⁶

Title 20 of the Pennsylvania Consolidated Statutes (20 Pa.C.S.) (Probate, Estates and Fiduciaries Code)

Chapter 1 Short Title and Definitions

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
102	Definitions			Amendment	Nov. 1975

Chapter 3 Ownership of Property; Legal Title and Equitable Estate

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
304	Application of payments made to fiduciaries			New	October 1983

²¹⁶ Because there are two reports dated May 2007, the report concerning assisted reproductive technologies is designed "May 2007 (A.R.T.)" in these tables.

Chapter 7
Orphans' Court Divisions

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
711	Mandatory exercise of jurisdiction through orphans' court division in general			Conforming amendment	May 2008 May 2007 (A.R.T.) Feb. 2002
				Amendment	May 1996 June 1991 May 1973
712	Nonmandatory exercise of jurisdiction through orphans' court division			Conforming amendment	May 1996
				Amendment	April 1994 June 1977 Nov. 1975 May 1973
713	Special provisions for Philadelphia County			Conforming amendment	May 2008 May 2007 (A.R.T.)
721	Venue of decedents' and minors' estates			Amendment	May 1973
723	Situs of testamentary trust			Repeal	April 2005 Nov. 2003
724	Situs of inter vivos trust			Repeal	April 2005 Nov. 2003
		(b)	Not provided for in trust instrument	Amendment	June 2001 April 1994
725	Change of situs; order of court			Repeal	April 2005 Nov. 2003
726	Venue of nonprofit corporations			New	June 1977
727	Venue of cemetery companies			New	June 1977
745	Advertisement of accounts				
		(a)	Requirement of notice; contents of notice	Amendment	October 1983
		(b)	Manner of advertisement	Amendment	June 1991 Feb. 1988 October 1985 October 1983
751	Appointment; purpose			Amendment	October 2012 March 1998
				Conforming amendment	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
752	Compensation			Amendment	October 2012
761	Petitions			Amendment	May 1979
779	Nonsuits			New	May 1973
		(a)	In general	New	May 1973
		(b)	Will contest	New	May 1973
		(c)	Other cases	New	May 1973

Chapter 9 Register of Wills

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
908	Appeals				
		(a)	When allowed	Amendment	April 2005 Nov. 2003 Nov. 1975
		(b)	Bond	Amendment	Nov. 1975
		(d)	Excepted appeals	Amendment	May 1973
911	Attestation of certain applications and documents			New	June 1991 Feb. 1988 October 1985
922	Inventories and appraisements			Amendment	May 1973
925	Affidavits of death			New	May 1973

Chapter 21 Intestate Succession

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
2101	Intestate estate			Amendment	April 1994
		(b)	Modification by decedent's will	New	April 1994
	Intestate descent			Amendment	June 1977
				Repeal	Nov. 1975
2101.1	Intestate estate			New	Nov. 1975
2102	Share of surviving spouse			Amendment	May 1979 June 1977
				Repeal	Nov. 1975
2102.1	Share of the spouse			New	Nov. 1975
2103	Shares of others than surviving spouse			Amendment	June 1977 Nov. 1975
2104	Rules of succession			Amendment	June 2001 June 1977

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
	Rules of descent			Amendment	Nov. 1975
2105	Spouse's rights			Amendment	June 1977
		(a)	Widow	Amendment	Nov. 1975
		(b)	Surviving husband	Amendment	Nov. 1975
2106	Forfeiture				
		(a)	Spouse's share	Amendment	October 2007
			Husband's share	Amendment	Nov. 1975
		(b)	Wife's share	Repeal	Nov. 1975
		(c)	Slayer's share	Amendment	May 1973
2108	Adopted person			Amendment	Nov. 1975
2109	Advancements			Repeal	Nov. 1975
2109.1	Advancements			New	Nov. 1975
2111	Procedure to establish title to real property when spouse claims entire estate			Repeal	June 1977 Nov. 1975
2112	Property distributable to the Commonwealth			Repeal	Nov. 1975
2113	Limitation of claims			Repeal	Nov. 1975
2114	Personal estate of nonresident			Repeal	Nov. 1975

Chapter 22
Elective Share of Surviving Spouse

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 22	Elective Share of Surviving Spouse			New	June 1977 Nov. 1975
2201	Definition of conveyance			New	June 1977 Nov. 1975
2202	Right of election; nonresident decedent			New	June 1977 Nov. 1975
2203	Right of election; resident decedent			New	June 1977 Nov. 1975
		(a)	Property subject to election	Amendment	May 1979
				New	June 1977 Nov. 1975
		(b)	Property not subject to election	New	June 1977 Nov. 1975
2204	Disclaimers, releases and charges against elective share			New	June 1977 Nov. 1975
		(a)	Disclaimers	Amendment	June 1991 Feb. 1988

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
				New	June 1977 Nov. 1975
		(b)	Conveyances and releases	New	June 1977 Nov. 1975
		(c)	Charges against elective share	Amendment	May 1979
				New	June 1977 Nov. 1975
		(d)	Definition of "beneficial interest"	New	June 1977 Nov. 1975
		(e)	Conditional decree	New	June 1977 Nov. 1975
2205	Transfers for value excluded			New	June 1977 Nov. 1975
2206	Right of election personal to surviving spouse			Amendment	March 1981
				New	June 1977 Nov. 1975
2207	Waiver of right to elect			New	June 1977 Nov. 1975
2208	Forfeiture of right of election; desertion; nonsupport; slaying			New	June 1977 Nov. 1975
2209	Surviving spouse as witness			Amendment	March 1981
				New	June 1977 Nov. 1975
2210	Procedure for election; time limit			New	June 1977 Nov. 1975
		(a)	How election made	New	June 1977 Nov. 1975
		(b)	Time limit	New	June 1977 Nov. 1975
		(c)	Costs	New	March 1981
2211	Determination of effect of election; enforcement			New	June 1977 Nov. 1975
		(a)	Power of court of domicile	New	June 1977 Nov. 1975
		(b)	Effect of election	New	June 1977 Nov. 1975
		(c)	Enforcement	New	June 1977 Nov. 1975
		(d)	Restraining orders	New	June 1977 Nov. 1975

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(e)	Protection of fiduciaries, custodians and obligors	New	June 1977 Nov. 1975
		(f)	Transferees and lienholders for value	New	June 1977 Nov. 1975

Chapter 25 Wills

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
2501	Who may make a will				
		(a)	Persons 18 or older	Amendment	Nov. 1975
		(b)	Persons in military service and mariners	Repeal	May 1973
2502	Form and execution of a will			Amendment	April 1994 May 1973
2503	Nuncupative wills			Repeal	May 1973
		(a)	When permissible	Repeal	May 1973
		(b)	Property disposable	Repeal	May 1973
		(c)	Effect on prior will	Repeal	May 1973
2504	Witnesses			Repeal	May 1973
		(a)	General rule	Repeal	May 1973
		(b)	Foreign execution	Repeal	May 1973
2504.1	Validity of execution			New	May 1973
2507	Modification by circumstances			Amendment	October 2007 June 1991 Feb. 1988 October 1985 Nov. 1975 May 1973
2508	Change by election of surviving spouse			Repeal	June 1977 Nov. 1975
2509	Forfeiture of right of election			Repeal	June 1977 Nov. 1975
		(a)	By husband	Repeal	Nov. 1975
		(b)	By wife	Repeal	Nov. 1975
2510	How election made			Repeal	June 1977 Nov. 1975
				Amendment	May 1973
2511	Time for making election			Repeal	June 1977 Nov. 1975
2512	Failure to make an election			Repeal	June 1977 Nov. 1975
		(a)	Effect	Amendment	Nov. 1975

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
2513	Grantee or lienholder			Repeal	June 1977 Nov. 1975
				Amendment ²¹⁷	Nov. 1975
2514	Rules of interpretation			Conforming amendment	June 2010
				Amendment	June 1991 Feb. 1988 October 1985 October 1983 Nov. 1975
2515	Devise or bequest to trust			Amendment	June 1991 Feb. 1988
2517	Rule in Shelley's case and doctrine of worthier title			Amendment	April 1994
		(b)	Doctrine of worthier title	New	April 1994
2519	Testamentary guardian				
		(a)	Guardian of the person	Amendment	Feb. 1988
2520	Personal estate of nonresident			Repeal	Nov. 1975
2521	Penalty clause for contest			New	April 1994

Chapter 27
Contractual Arrangements Relating to Succession

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 27	Contractual Arrangements Relating to Succession			New	June 1991 Feb. 1988 October 1985
2701	Contracts concerning succession			New	June 1991 Feb. 1988 October 1985
		(a)	Establishment of contract	New	June 1991 Feb. 1988 October 1985
		(b)	Joint will or mutual wills	New	June 1991 Feb. 1988 October 1985

²¹⁷ See *supra* note 60.

Chapter 28
Formula Clauses for Federal Tax Purposes

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 28	Formula Clauses for Federal Tax Purposes			New	June 2010
2801	Definitions			New	June 2010
2802	Interpretation of formula clauses			New	June 2010
		(a)	General rule	New	June 2010
		(b)	Exception	New	June 2010
2803	Judicial proceeding			New	June 2010
		(a)	Standing	New	June 2010
		(b)	Commencement	New	June 2010
		(c)	Considerations	New	June 2010
		(d)	Modifications	New	June 2010
		(e)	Effective date of interpretation or modification	New	June 2010

Chapter 31
Dispositions Independent of Letters; Family Exemption;
Probate of Wills and Grant of Letters

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
3101	Payments to family and funeral directors				
	Payments to family			Amendment (restructured)	May 1979
	Payment of wages, salary, vacation benefits to family			Amendment (restructured)	Nov. 1975 May 1973
		(a)	Wages, salary or employee benefits	Amendment	June 2010 April 1994
				Amendment (restructured)	May 1979 Nov. 1975 May 1973
		(b)	Deposit account	Amendment	June 2010
				New	May 1979 Nov. 1975 May 1973
		(c)	Patient's care account	Amendment	June 2010
			Payments to funeral directors	New	May 1979

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(d)	Life insurance payable to estate	New	March 1981
3102	Settlement of small estates on petition			Amendment	June 2010 April 1994 May 1973
3121	When allowable			Amendment	April 1994 May 1973
3122	Payment or delivery of exemption				
		(b)	Property set aside for minors	Amendment	May 1973
3132	Manner of probate			Amendment	May 1973
3132.1	Self-proved wills				
		(a)	Proof	Amendment	October 1983
		(b)	Acknowledgment and affidavits	Amendment	October 1983 March 1981
		(c)	Acknowledgment and affidavit taken before an attorney at law	New	October 1983
3133	Limit of time for probate				
		(a)	Original probate	Amendment	May 1973
		(c)	Effect upon grantee or mortgagee	Amendment	May 1979
3134	Nuncupative wills			Repeal	May 1973
3153	Contents of petition			Amendment	May 1979
3154	Affidavit and oath			Amendment	Feb. 1988
		(a)	Fiduciary and witnesses	Amendment	Feb. 1988
		(b)	Subscribing witness	New	Feb. 1988
3155	Persons entitled				
		(b)	Letters of administration	Amendment	March 1984
3162	Advertisement of grant of letters			Conforming amendment	June 2010
				Amendment	June 1977
		(a)	Notice generally	New (restructured)	June 2010 October 2007
		(b)	Proofs of advertisement to trustee	New	June 2010 October 2007
3163	Submission to jurisdiction			New	June 2010
3174	When not required				
		(a)	Corporate personal representative	Amendment	Nov. 1975

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Resident personal representative	Repeal	May 1979
			Instances when bond not required	New	May 1979
			Resident executor	Amendment	Nov. 1975
		(b.1)	Nonresident co-personal representative	Repeal	May 1979
				New	Nov. 1975
		(c)	Nonresident personal representative	Repeal	May 1979
			Nonresident executor	Amendment	Nov. 1975
		(d)	Estates under \$5,000	Repeal	May 1979

Chapter 33
Administration and Personal Representatives

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
3301	Duty of personal representative				
		(a)	General assets	Amendment	October 1983
		(b)	Real estate outside of Commonwealth	Amendment	October 1983
		(c)	Time for filing	New	October 1983
3314	Continuation of business			Amendment	June 2010
3315	Incorporation of estate's business			Amendment	June 2010
3316	Investment of funds			Conforming amendment	March 1998
				Amendment	June 1991 Feb. 1988 October 1985
3316.1	Set aside			New	March 1998
3321	Nominee registration; corporate fiduciary as attorney-in-fact; deposit of securities in a clearing corporation; book-entry securities				
		(e)	Accounting for book-entry securities	Amendment	June 1991 Feb. 1988

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
3330	Notice of devise or bequest to corporation or association			Repeal	June 1991
	Notice to beneficiaries and heirs			New	June 1991
		(a)	Requirement of notice	New	June 1991
		(b)	Contents of notice	New	June 1991
		(c)	Manner of notice	New	June 1991
		(d)	Certification	New	June 1991
		(e)	No rights	New	June 1991
3351	Power to sell			Amendment	May 1973
3353	Order of court			Amendment	May 1973
3356	Purchase by personal representative			Amendment	May 1973
3357	Title of purchaser				
		(a)	General rule	Amendment	Nov. 1975
3376	Limitations against debt due estate			Amendment	Nov. 1975 May 1973
3384.1	Notice after settlor of revocable fund has died			New (Conforming amendment)	April 2005 Nov. 2003

Chapter 35
Accounts and Distribution

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
3501.2	Annexation of account of terminated trust, guardianship or agency			New	October 1983
3502	Where filed			Amendment	October 1983
3503	Notice to parties in interest			Amendment	June 1991
3504	Representation of parties in interest			Amendment	April 1994
3531	Estates not exceeding \$10,000			Amendment	April 1994
	Estates not exceeding \$5,000			Amendment	May 1973
3532	At risk of personal representative				
		(a)	Rights of claimants against personal representative	Amendment	June 1991

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Rights of claimants against distributed property	Amendment	June 1991
		(b.1)	Limitation on rights of claimants	New	June 1991
		(c)	Record of risk distributions	New	Nov. 1975
3534.1	Cost of distribution of tangible personal property			New	April 2005 Nov. 2003
3539	Change in law after pattern of distribution established			New (section previously reserved)	October 1983
	Information services			New	March 1981 May 1979
3540	Absentee and additional distributees			New	May 1979
		(a)	Distributions due absentees	Amendment	October 1983
				New	May 1979
		(b)	Possibility of additional distributees	Amendment	October 1983
				New	May 1979
3543	Interest or income on distributive shares			Amendment	May 1979
		(a)	Pecuniary legacy	Amendment	April 2005 Nov. 2003 May 1979
		(c)	Demonstrative legacy	Amendment	April 2005 Nov. 2003 May 1979
		(d)	Residuary legacy or devise	Amendment	April 2005 Nov. 2003
		(e)	Future date	Amendment	April 2005 Nov. 2003
		(f)	Relationship	Amendment	April 2005 Nov. 2003
3546	Determination of title to decedent's interest in real estate			Amendment (rewritten)	June 2010
		(a)	Applicability	New	June 2010
		(b)	Who may petition	New	June 2010
		(c)	Where to petition	New	June 2010
		(d)	Notice of petition	New	June 2010
		(e)	Decree	New	June 2010

Chapter 37
Apportionment of Death Taxes

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 37	Estate Tax Apportionment			Repeal	March 1981
	Apportionment of Death Taxes			New	March 1981
3701	Power of decedent			Amendment	June 2001 April 1994
				Technical amendment	June 1991 Feb. 1988 October 1985
				New	March 1981
3702	Equitable apportionment of Federal estate tax			New	March 1981
		(a)	General rule	Technical amendment	June 1991 Feb. 1988 October 1985
				New	March 1981
		(b)	Pre-residuary	Technical amendment	June 1991 Feb. 1988 October 1985
				New	March 1981
		(c)	Deductions	Technical amendment	June 1991 Feb. 1988 October 1985
				New	March 1981
		(d)	Credits	Technical amendment	June 1991 Feb. 1988 October 1985
				New	March 1981
		(e)	Election by spouse	New	March 1981
		(f)	Additional Federal estate tax	Amendment	June 2001
				New	March 1981
		(g)	Present and future interests	New	March 1981
		(h)	Interest and penalties	Amendment	April 2005
				Conforming amendment	June 2001
				New	March 1981
		(i)	Values	New	March 1981
		(j)	Gift tax	New	June 2001

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
3703	Apportionment of Pennsylvania inheritance tax			Amendment	June 1991 Feb. 1988 October 1985
				New	March 1981
	General rules				
		(a)	Powers of testator or settlor	Amendment	Nov. 1975
3704	Apportionment of Pennsylvania estate tax			New	March 1981
3705	Apportionment of Federal generation-skipping tax			New	March 1981
3706	Enforcement of contribution or exoneration of Federal estate tax			New	March 1981
		(a)	Duty to pay	Amendment	October 2007
				New	March 1981
		(b)	Duty of fiduciary	Amendment	October 2007
				New	March 1981
		(c)	Suspending distribution	Amendment	October 2007 June 1991 Feb. 1988 October 1985
				New	March 1981
		(d)	Court decrees	Amendment	October 2007
				New	March 1981

**Chapter 41
Foreign Fiduciaries**

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
4102	Powers with respect to securities and bank accounts				
		(b)	Bank accounts	Amendment	March 1981

**Chapter 43
Temporary Fiduciaries**

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 43	Temporary Fiduciaries			New	May 1973
4301	Appointment of temporary fiduciary			New	May 1973
4302	Petition for relief; joinder of parties; notice			New	May 1973
4303	Security by substituted fiduciaries; duties and responsibilities			New	May 1973
4304	Duration of decree; impeachment of acts			New	May 1973
4305	Fiduciaries temporarily relieved of duties and liabilities			New	May 1973
4306	Power to control, remove, discharge and settle accounts			New	May 1973

**Chapter 51
Minors**

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5101	When guardian unnecessary			Amendment	April 1994 May 1973
5103	Sequestered deposit			New	May 1973
5116	Orphan beneficiaries, charitable uses or trusts; administration, cities of first class			Amendment	June 1977
5144	Powers, duties and liabilities identical with personal representatives			Amendment	March 1981
5145	Investments			Conforming amendment	March 1998
5147	Proceedings against guardian			Amendment	March 1981
5153	Provisions identical to other estates			Amendment	March 1981 May 1973
5154	Title of purchaser			Amendment	May 1973
5155	Order of court			New	May 1973
5161	When accounting filed			Amendment	June 1977

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5163	Notice, audits, reviews and distribution			Amendment	June 1977
5163.1	Distribution to personal representative			Repeal	October 1983
				New	Nov. 1975
5164	Distributions for support and education			Conforming amendment	June 2001
				Amendment	June 1991

Chapter 53
Pennsylvania Uniform Transfers to Minors Act

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 53	Pennsylvania Uniform Gifts to Minors Act			Repeal	June 1991 Feb. 1988 October 1985
5301	Short title; registration of ownership			Repeal	June 1991 Feb. 1988 October 1985
5302	Definitions			Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981 May 1973
5303	Manner of making gift			Repeal	June 1991 Feb. 1988 October 1985
		(a)	General rule	Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981 May 1973
		(a.1)	Gifts by will or trust	Repeal	June 1991 Feb. 1988 October 1985
				New	March 1981
		(b)	Limitations	Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981
		(c)	Duty of donor	Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5304	Effect of gift	(a) - (b)		Repeal	June 1991 Feb. 1988 October 1985
5305	Duties and powers of custodian	(a) - (c)		Repeal	June 1991 Feb. 1988 October 1985
		(d)		Repeal	June 1991 Feb. 1988 October 1985
				Amendment	May 1973
		(e)	Investment and retention of property	Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981
		(f)	Disposal of property and voting securities	Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981
		(g)	Registration, deposit and separation of property	Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981 May 1973
		(h) - (j)		Repeal	June 1991 Feb. 1988 October 1985
5306	Custodian's expenses, compensation, bond and liabilities			Repeal	June 1991 Feb. 1988 October 1985
		(a) - (e)		Repeal	June 1991 Feb. 1988 October 1985
5307	Exemption of third persons from liability			Repeal	June 1991 Feb. 1988 October 1985
5308	Resignation, death or removal of custodian; bond; designation of successor custodian			Repeal	June 1991 Feb. 1988 October 1985
		(a)	Eligibility and designation of successor	Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981
		(b)	When designation of successor takes effect	Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(c)		Repeal	June 1991 Feb. 1988 October 1985
		(d)	Ineligibility, death or incapacity of custodian	Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981 May 1973
		(e)	Petition for removal or requiring bond	Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981
		(f)		Repeal	June 1991 Feb. 1988 October 1985
5309	Accounting by custodian			Repeal	June 1991 Feb. 1988 October 1985
		(a)	Petition for accounting	Repeal	June 1991 Feb. 1988 October 1985
				Amendment	March 1981
		(b)	Order for accounting or delivery of property	Repeal	June 1991 Feb. 1988 October 1985
5310	Construction	(a) - (b)		Repeal	June 1991 Feb. 1988 October 1985
Chapter 53	Pennsylvania Uniform Transfers to Minors Act			New	June 1991 Feb. 1988 October 1985
5301	Short title of chapter and definitions			New	June 1991
		(a)	Short title of chapter	New	June 1991
		(b)	Definitions	Amendment	June 2001
				New	June 1991
	Short title of chapter			New	Feb. 1988 October 1985
5302 ²¹⁸	Scope and jurisdiction			New	June 1991 Feb. 1988 October 1985
		(a)	Application of chapter	New	June 1991 Feb. 1988 October 1985

²¹⁸ Section 5303 in the February 1988 and October 1985 reports. Section 5302 in the February 1988 and October 1985 reports contains definitions.

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Jurisdiction over custodian	New	June 1991 Feb. 1988 October 1985
		(c)	Laws of other states	New	June 1991 Feb. 1988 October 1985
	Definitions			New	Feb. 1988 October 1985
5303 ²¹⁹	Nomination of custodian			New	June 1991 Feb. 1988 October 1985
		(a)	General rule	New	June 1991 Feb. 1988 October 1985
		(b)	Qualification of custodian	New	June 1991 Feb. 1988 October 1985
		(c)	When effective	New	June 1991 Feb. 1988 October 1985
5304 ²²⁰	Transfer by gift or exercise of power of appointment			New	June 1991 Feb. 1988 October 1985
5305 ²²¹	Transfer authorized by will or trust			New	June 1991 Feb. 1988 October 1985
		(a)	General rule	New	June 1991 Feb. 1988 October 1985
		(b)	Transfer to custodian	New	June 1991 Feb. 1988 October 1985
		(c)	Designation of custodian	New	June 1991 Feb. 1988 October 1985
5306 ²²²	Other transfer by fiduciary			New	June 1991 Feb. 1988 October 1985
		(a)	Irrevocable transfer by personal representative or trustee	New	June 1991 Feb. 1988 October 1985

²¹⁹ Section 5304 in the February 1988 and October 1985 reports.

²²⁰ Section 5305 in the February 1988 and October 1985 reports.

²²¹ Section 5306 in the February 1988 and October 1985 reports.

²²² Section 5307 in the February 1988 and October 1985 reports.

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Irrevocable transfer by guardian	New	June 1991 Feb. 1988 October 1985
		(c)	Additional requirements for transfer	Amendment	March 1998
				New	June 1991 Feb. 1988 October 1985
5307 ²²³	Transfer by obligor			New	June 1991 Feb. 1988 October 1985
		(a)	Irrevocable transfer for benefit of minor	New	June 1991 Feb. 1988 October 1985
		(b)	Transfer to custodian	New	June 1991 Feb. 1988 October 1985
		(c)	Transfer to minor's family or trust company	New	June 1991 Feb. 1988 October 1985
5308 ²²⁴	Receipt for custodial property			New	June 1991 Feb. 1988 October 1985
5309 ²²⁵	Manner of creating custodial property and effecting transfer			New	June 1991 Feb. 1988 October 1985
		(a)	Creation of custodial property	New	June 1991 Feb. 1988 October 1985
		(b)	Form	New	June 1991 Feb. 1988 October 1985
		(c)	Control of custodial property	New	June 1991 Feb. 1988 October 1985
5310 ²²⁶	Single custodianship			New	June 1991 Feb. 1988 October 1985
5311 ²²⁷	Validity and effect of transfer			New	June 1991 Feb. 1988 October 1985

²²³ Section 5308 in the February 1988 and October 1985 reports.

²²⁴ Section 5309 in the February 1988 and October 1985 reports.

²²⁵ Section 5310 in the February 1988 and October 1985 reports.

²²⁶ Section 5311 in the February 1988 and October 1985 reports.

²²⁷ Section 5312 in the February 1988 and October 1985 reports.

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(a)	Validity of transfer	New	June 1991 Feb. 1988 October 1985
		(b)	Irrevocability of transfer	New	June 1991 Feb. 1988 October 1985
		(c)	Incorporation of provisions of this chapter	New	June 1991 Feb. 1988 October 1985
5312 ²²⁸	Care of custodial property			New	June 1991 Feb. 1988 October 1985
		(a)	Duties of custodian	New	June 1991 Feb. 1988 October 1985
		(b)	Standard of care	New	June 1991 Feb. 1988 October 1985
		(c)	Life insurance and endowment policies	New	June 1991 Feb. 1988 October 1985
		(d)	Segregation of custodial property	New	June 1991 Feb. 1988 October 1985
		(e)	Records	New	June 1991 Feb. 1988 October 1985
5313 ²²⁹	Powers of custodian			New	June 1991 Feb. 1988 October 1985
		(a)	General rule	New	June 1991 Feb. 1988 October 1985
		(b)	Liability for breach of standard of care	New	June 1991 Feb. 1988 October 1985
5314 ²³⁰	Use of custodial property			New	June 1991 Feb. 1988 October 1985
		(a)	Without court order	New	June 1991 Feb. 1988 October 1985
		(b)	With court order	New	June 1991 Feb. 1988

²²⁸ Section 5313 in the February 1988 and October 1985 reports.

²²⁹ Section 5314 in the February 1988 and October 1985 reports.

²³⁰ Section 5315 in the February 1988 and October 1985 reports.

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
					October 1985
		(c)	Obligation of support not affected	New	June 1991 Feb. 1988 October 1985
5315 ²³¹	Expenses, compensation and bond of custodian			New	June 1991 Feb. 1988 October 1985
		(a)	Expenses	New	June 1991 Feb. 1988 October 1985
		(b)	Compensation	New	June 1991 Feb. 1988 October 1985
		(c)	Bond	New	June 1991 Feb. 1988 October 1985
5316 ²³²	Exemption of third person from liability			New	June 1991 Feb. 1988 October 1985
5317 ²³³	Liability to third persons			New	June 1991 Feb. 1988 October 1985
		(a)	Claim against custodial property	New	June 1991 Feb. 1988 October 1985
		(b)	Limitation on custodian's liability	New	June 1991 Feb. 1988 October 1985
		(c)	Limitation on minor's personal liability	New	June 1991 Feb. 1988 October 1985
5318 ²³⁴	Renunciation, resignation, death or removal of custodian			New	June 1991 Feb. 1988 October 1985
		(a)	Renunciation	New	June 1991 Feb. 1988 October 1985
		(b)	Designation of trust company or adult as successor custodian	New	June 1991 Feb. 1988 October 1985
		(c)	Resignation	New	June 1991 Feb. 1988 October 1985

²³¹ Section 5316 in the February 1988 and October 1985 reports.

²³² Section 5317 in the February 1988 and October 1985 reports.

²³³ Section 5318 in the February 1988 and October 1985 reports.

²³⁴ Section 5319 in the February 1988 and October 1985 reports.

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(d)	Ineligibility, death or incapacitation	New	June 1991 Feb. 1988 October 1985
		(e)	Transfer of custodial property and records to successor custodian	New	June 1991 Feb. 1988 October 1985
		(f)	Removal for cause	New	June 1991 Feb. 1988 October 1985
5319 ²³⁵	Accounting by and determination of liability of custodian			New	June 1991 Feb. 1988 October 1985
		(a)	Petition	New	June 1991 Feb. 1988 October 1985
		(b)	Petition by successor custodian for accounting by predecessor	New	June 1991 Feb. 1988 October 1985
		(c)	Court order to account	New	June 1991 Feb. 1988 October 1985
		(d)	Court order when custodian removed	New	June 1991 Feb. 1988 October 1985
5320 ²³⁶	Termination of custodianship			Amendment	June 2001
				New	June 1991 Feb. 1988 October 1985
5321	Delay in transfer of custodial property after minor attains age 21			New	June 2001
		(a)	General rule	New	June 2001
		(b)	How to specify a delayed time for transfer	New	June 2001
		(c)	Transfer authorized by will or trust; nomination of custodian	New	June 2001
		(d)	Transfer by exercise of power [of] appointment	New	June 2001

²³⁵ Section 5320 in the February 1988 and October 1985 reports.

²³⁶ Section 5321 in the February 1988 and October 1985 reports.

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(e)	When section not applicable	New	June 2001
		(f)	When transfer does not specify age	New	June 2001
		(g)	When transfer provides for a longer duration of custodianship than permitted by this section	New	June 2001

**Chapter 54
Health Care**

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 54: 5401-5416	Advance Directive for Health Care			Repeal	Feb. 2002
Chapter 54 5401	Health Care Applicability			New	Feb. 2002
		(a)	General rule	New	Feb. 2002
		(b)	Preservation of existing rights	New	Feb. 2002
	Definitions			New	March 1998
	Short title of chapter			Amendment	March 1998
5402	Definitions			New	Feb. 2002
	Legislative findings and intent				
		(b)	Intent	Amendment	March 1998
5403	Legislative findings and intent				
		(a)	Intent	New	Feb. 2002
		(b)	Presumption not created	New	Feb. 2002
		(c)	Findings in general	New	Feb. 2002
	Definitions			Repeal	March 1998
5404	Compliance				
		(a)	Notification by attending physician or health care provider	New	Feb. 2002
		(b)	Transfer	New	Feb. 2002
		(c)	Employee or staff member of health care provider	New	Feb. 2002
		(d)	Liability	New	Feb. 2002

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
	Declaration				
		(a)	Execution	Amendment	March 1998
		(b)	Form	Amendment	March 1998
		(c)	Invalidity of specific direction	Amendment	March 1998
		(d)	Medical record	Amendment	March 1998
5405	Death not suicide or homicide			New	Feb. 2002
	When declaration becomes operative			Amendment	March 1998
5406	Life insurance			New	Feb. 2002
5407	Health care instruments optional			New	Feb. 2002
	Liability				
		(a)	General rule	Amendment	March 1998
		(b)	Absence of declaration	Amendment	March 1998
5408	Pregnancy				
		(a)	Declarations and health care decisions	New	Feb. 2002
		(b)	Pregnancy test	New	Feb. 2002
		(c)	Payment of expenses by Commonwealth	New	Feb. 2002
5409	Liability				
		(a)	General rule	New	Feb. 2002
		(b)	Same effect as if dealing with principal	New	Feb. 2002
		(c)	Good faith of health care agent	New	Feb. 2002
	Unwillingness to comply; transfer of declarant			Amendment	March 1998
		(a)	Attending physician or health care provider	Amendment	March 1998
		(b)	Employee or staff member of health care provider	Amendment	March 1998
		(c)	Liability	Amendment	March 1998
5410	Penalties				
		(a)	Felonies of the third degree	New	Feb. 2002
		(b)	Prosecution for criminal homicide	New	Feb. 2002
	Effect on suicide and life insurance				

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(a)	Criminal effect	Amendment	March 1998
		(b)	Life insurance	Amendment	March 1998
5411	Combining health care instruments				
		(a)	General rule	New	Feb. 2002
		(b)	Form	New	Feb. 2002
	Declaration optional			Amendment	March 1998
5412	Preservation of existing rights			Amendment	March 1998
5413	Emergency medical services				
		(a)	Care given prior to declaration taking effect	Amendment	March 1998
5415	Penalties			Amendment	March 1998
5416	Severability			Repeal	March 1998
5421	Short title of subchapter			New	Feb. 2002 March 1998
5422	Definitions			Amendment	March 2010
	Execution			New	Feb. 2002
		(a)	Who may make	New	Feb. 2002
		(b)	Requirements	New	Feb. 2002
		(c)	Witnesses	New	Feb. 2002
	General provisions			New	March 1998
		(a)	Who may execute a health care power of attorney	New	March 1998
		(b)	Execution	New	March 1998
5423	Form			New	Feb. 2002
	Form of health care power of attorney			New	March 1998
		(a)	Requirements	New	March 1998
		(b)	Optional provisions	New	March 1998
		(c)	Invalidity of specific direction	New	March 1998
5424	Operation			New	Feb. 2002
		(a)	When operative	New	Feb. 2002
		(b)	Compliance	New	Feb. 2002
		(c)	Invalidity of specific direction	New	Feb. 2002
		(d)	Medical record	New	Feb. 2002
		(e)	Duration	New	Feb. 2002
		(f)	Absence of declaration	New	Feb. 2002
		(g)	Duty of physician to confirm terminal condition	New	Feb. 2002

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
	Countermand, amendment and revocation			New	March 1998
		(a)	Countermand of health care decision	New	March 1998
		(b)	Amendment	New	March 1998
		(c)	Divorce	New	March 1998
		(d)	Revocation	New	March 1998
		(e)	Effect of revocation	New	March 1998
5425	Revocation			New	Feb. 2002
		(a)	When declaration may be revoked	New	Feb. 2002
		(b)	Effect of revocation	New	Feb. 2002
		(c)	Medical record	New	Feb. 2002
	Operation of health care power of attorney			New	March 1998
		(a)	When operative	New	March 1998
		(b)	Duration	New	March 1998
		(c)	Extent of authority of agent	New	March 1998
		(d)	Life-sustaining treatment decisions	New	March 1998
		(e)	Health care decisions	New	March 1998
		(f)	Health care information	New	March 1998
		(g)	Court approval unnecessary	New	March 1998
5426	Emergency medical services			New	Feb. 2002
		(a)	Care given prior to declaration taking effect	New	Feb. 2002
		(b)	Care given after declaration takes effect	New	Feb. 2002
		(c)	Uncertainty regarding validity of declaration	New	Feb. 2002
	Appointment of health care agents			New	March 1998
		(a)	Multiple and successor health care agents	New	March 1998
		(b)	Limitation on appointment of agent	New	March 1998

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5427	Relation of health care agent to court-appointed guardian and other agents			New	March 1998
		(a)	Accountability of health care agent	New	March 1998
		(b)	Nomination of guardian of person	New	March 1998
		(c)	Reasonable expenses	New	March 1998
5428	Decisions by health care representative			New	March 1998
		(a)	General rule	New	March 1998
		(b)	Extent of authority of health care representative	New	March 1998
		(c)	Who may act as health care representative	New	March 1998
		(d)	Disqualification	New	March 1998
		(e)	Limitation on designation of health care representative	New	March 1998
		(f)	Decision of health care representative	New	March 1998
		(g)	Duty of health care representative	New	March 1998
		(h)	Countermand of health care decision	New	March 1998
		(i)	Court approval unnecessary	New	March 1998
		(j)	Written declaration of health care representative	New	March 1998
5429	Duties of attending physician and health care provider			New	March 1998
		(a)	Communication of health care decision	New	March 1998
		(b)	Compliance with decisions of health care agent or health care representative	New	March 1998
		(c)	Medical record	New	March 1998
		(d)	Medical record entry	New	March 1998
		(e)	Record of determination	New	March 1998
5430	Limitations on liability			New	March 1998

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(a)	Attending physician, health care provider and health care institution	New	March 1998
		(b)	Health care agent	New	March 1998
		(c)	Health care representative	New	March 1998
		(d)	Death not suicide or homicide	New	March 1998
5431	Short title of subchapter			New	Feb. 2002
	Unwillingness to comply and transfer of principal			New	March 1998
		(a)	Attending physician or health care provider	New	March 1998
		(b)	Employee or staff member of health care provider	New	March 1998
		(c)	Liability	New	March 1998
5432	Execution			New	Feb. 2002
		(a)	Who may make	New	Feb. 2002
		(b)	Requirements	New	Feb. 2002
		(c)	Witnesses	New	Feb. 2002
	Effect on life insurance			New	March 1998
5433	Form			New	Feb. 2002
		(a)	Requirements	New	Feb. 2002
		(b)	Optional provisions	New	Feb. 2002
		(c)	Written form	New	Feb. 2002
	Conditioning services or action			New	March 1998
5434	Operation			New	Feb. 2002
		(a)	When operative	New	Feb. 2002
		(b)	When inoperative	New	Feb. 2002
		(c)	Invalidity of specific direction	New	Feb. 2002
		(d)	Duration	New	Feb. 2002
		(e)	Court approval unnecessary	New	Feb. 2002
	Criminal penalties			New	March 1998
		(a)	Tampering with a health care power of attorney	New	March 1998
		(b)	Tampering resulting in death	New	March 1998

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5435	Appointment of health care agents			New	Feb. 2002
		(a)	Multiple and successor health care agents	New	Feb. 2002
		(b)	Whom may not be appointed health care agent	New	Feb. 2002
	Effect on other State law			New	March 1998
		(a)	Mental health	New	March 1998
		(b)	Prohibited care	New	March 1998
		(c)	Consent	New	March 1998
		(d)	Preservation of religious rights	New	March 1998
		(e)	Individual rights	New	March 1998
		(f)	Disclosure	New	March 1998
5436	Authority of health care agent			New	Feb. 2002
		(a)	Extent of authority	New	Feb. 2002
		(b)	Life-sustaining treatment decisions	New	Feb. 2002
		(c)	Health care decisions	New	Feb. 2002
		(d)	Health care information	New	Feb. 2002
	Conflicting health care powers of attorney			New	March 1998
5437	Countermand			New	Feb. 2002
	Validity			New	March 1998
5438	Amendment			New	Feb. 2002
5439	Effect of divorce			New	Feb. 2002
5440	Revocation			New	Feb. 2002
		(a)	When health care power of attorney may be revoked	New	Feb. 2002
		(b)	Reliance on health care power of attorney	New	Feb. 2002
		(c)	Subsequent action by agent	New	Feb. 2002
5441	Relation of health care agent to court-appointed guardian and other agents			New	Feb. 2002
		(a)	Accountability of health care agents	New	Feb. 2002

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Nomination of guardian of person	New	Feb. 2002
		(c)	Reasonable expenses	New	Feb. 2002
5442	Duties of attending physician and health care provider			New	Feb. 2002
		(a)	Duty to confirm terminal condition	New	Feb. 2002
		(b)	Communication of health care decision	New	Feb. 2002
		(c)	Compliance with decisions of health care agent	New	Feb. 2002
		(d)	Medical record	New	Feb. 2002
		(e)	Record of determination	New	Feb. 2002
5443	Effect on other State law			New	Feb. 2002
		(a)	Mental health	New	Feb. 2002
		(b)	Prohibited care	New	Feb. 2002
		(c)	Consent	New	Feb. 2002
		(d)	Preservation of religious rights	New	Feb. 2002
		(e)	Rights of individuals	New	Feb. 2002
		(f)	Disclosure	New	Feb. 2002
5444	Conflicting health care powers of attorney			New	Feb. 2002
5445	Validity			New	Feb. 2002
5456	Authority of health care agent				
		(a)	Extent of authority	Amendment	March 2010
5460	Relation of health care agent to court-appointed guardian and other agents				
		(a)	Accountability of health care agent	Amendment	March 2010

Chapter 55
Incapacitated Persons

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5500	Purpose			New	March 1984
5501	Meaning of incompetent			Amendment	March 1984 Sept. 1974 May 1973
5503	Venue			New	October 2012
		(a)	Applicability	New	October 2012
		(b)	Guardian of person	New	October 2012
		(c)	Guardian of estate	New	October 2012
		(d)	Multiple judicial districts	New	October 2012
	Transfer of jurisdiction			New	May 2007
		(a)	Transfer permissible	New	May 2007
		(b)	Notice to other court	New	May 2007
		(c)	Guardian appointed in another state	New	May 2007
5504	Confidentiality and disclosure of information			New	October 2012
	Venue			New	May 2007
		(a)	Guardian of the person	New	May 2007
		(b)	Guardian of the estate	New	May 2007
		(c)	Multiple judicial districts	New	May 2007
5505	Provisions similar to small estates of minors' estates			Amendment	May 1973
5510	Definitions			New	March 1984
5511	Petition and hearing; independent evaluation				
		(a)	Resident	Repeal	October 2012
				Amendment	May 2007 May 1996
		(a.1)	Resident	New	October 2012
			Appointment of counsel	New	May 2007
		(a.2)	Appointment of counsel	New	October 2012
		(e)	Petition and contents	Amendment	June 2011
		(f)	Who may be appointed guardian	Amendment (rewritten)	October 2012 May 2007
				Amendment	May 1996

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(g)	Who may not be appointed guardian	New	October 2012 May 2007
		(h)	Preference in appointing guardian of person	New	October 2012
			Priority in appointing guardian	New	May 2007
		(i)	Preference in appointing guardian of estate	New	October 2012
	Petition and hearing; examination by court-appointed physician				
		(a)	Resident	Amendment	March 1984
	Petition and hearing				
		(a)	Resident	Amendment	Sept. 1974 May 1973
		(c)	Contents of petition	New	Sept. 1974
			Court appointed physician	New	May 1973
		(d)	Rights of an alleged incompetent	New	Sept. 1974
		(e)	Dismissal of petition	New	Sept. 1974
5512	County of appointment; qualifications			Repeal	October 2012 May 2007
		(a)	Resident incapacitated person	Repeal	October 2012 May 2007
		(b)	Nonresident incapacitated person	Repeal	October 2012 May 2007
		(c)	Exclusiveness of appointment	Repeal	October 2012 May 2007
	County of appointment				
		(a)	Resident incompetent	Amendment	Sept. 1974
5512.1	Determination of incapacity and appointment of guardian				
		(a)	Determination of incapacity	Amendment	May 1996
		(c)	Plenary guardian of the person	Amendment	May 1996
		(e)	Plenary guardian of the estate	Amendment	May 1996
	Determination of incompetency			New	March 1984
		(a)	Findings	New	March 1984

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Nature of the guardianship	New	March 1984
		(c)	Legal rights retained	New	March 1984
		(d)	Review hearing	New	March 1984
5512.2	Review hearing				
		(a)	Time of hearing	Amendment	October 2012 May 2007
		(b)	Burden of proof and rights	Amendment	May 2007
		(c)	Independent evaluation	New	October 2012 May 2007
5512.4	Affidavit in uncontested termination matters			New	October 2012
5512.5	Counsel			New	October 2012
5513	Emergency guardian			Repeal	October 2012
				Amendment (restructured)	May 2007
				Amendment	May 1996
		(a)	Appointment	New	October 2012
				Amendment	May 2007
		(b)	Procedures and powers generally	New	October 2012
				Amendment	May 2007
		(c)	Duration of initial order	New	October 2012
				Amendment	May 2007
		(d)	Appointment of counsel	New	October 2012 May 2007
		(e)	Extension of order	New	October 2012 May 2007
		(f)	Procedure upon expiration of order	Amendment	May 2007
	Temporary guardian			Amendment	June 1991 February 1988 October 1985
5514	To fill vacancy; co-guardian			Amendment	March 1984
5515	Provisions similar to other estates			Repeal	October 2012
				Amendment	Sept. 1974 May 1973
5515.1	Removal and discharge of guardian			New	October 2012
		(a)	Conditions	New	October 2012
		(b)	Procedure	New	October 2012

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(c)	Discharge of guardian and surety	New	October 2012
5515.2	Appointment of guardian in conveyance			New	October 2012
5515.3	Bond	(a)	General rule	New	October 2012
		(b)	Exceptions	New	October 2012
		(c)	Court discretion	New	October 2012
		(d)	Amount	New	October 2012
5517	Adjudication of competency			Amendment (restructured)	Sept. 1974
		(a)	Adjudication of competency	Amendment (restructured)	Sept. 1974
		(b)	Review of guardianship	New	Sept. 1974
		(c)	Request for review	New	Sept. 1974
5518	Evidence of incapacity			Amendment	October 2012 May 2007 May 1996
	Evidence of mental condition			Amendment	March 1984
5518.1	Cross-examination of witnesses			Amendment	October 2012 May 2007 May 1996
5519	Scope of decree; extent of guardian's powers and duties			New	Sept. 1974
		(a)	In general	New	Sept. 1974
		(b)	Limited guardianship of the person	New	Sept. 1974
		(c)	Standards	New	Sept. 1974
5519.1	Selection of guardians			New	Sept. 1974
5521	Provisions concerning powers, duties and liabilities			Amendment	March 1984 May 1973
		(a)	In general	New (restructured)	March 1984
		(a.1)	Death or removal of guardian	New	October 2012
		(b)	Duty of guardian of the estate	Repeal	October 2012
				Amendment	May 2007
			Powers and duties not granted to guardian	New	March 1984

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b.1)	Powers of guardian of the estate without further court approval	New	October 2012
		(b.2)	Powers of guardian of the estate with further court approval	New	October 2012
		(b.3)	Revival of judgment	New	October 2012
		(b.4)	Death or incapacity of guardian of estate	New	October 2012
		(b.5)	Surviving or remaining guardians	New	October 2012
		(b.6)	Disagreement of guardians of the estate	New	October 2012
		(b.7)	Filing of decree	New	October 2012
		(b.8)	Inadequacy of consideration	New	October 2012
		(b.9)	Substitution of party	New	October 2012
		(b.10)	Specific performance of contracts	New	October 2012
		(b.11)	Abandonment of property	New	October 2012
		(b.12)	Title of purchaser	New	October 2012
		(b.13)	Compromise or settlement	New	October 2012
		(c)	Reports	Amendment	October 2012 May 2007 May 1996
		(c.1)	Records of guardian	New	October 2012
		(d.1)	Health care decisions	New	June 2011
		(g)	Criminal and civil liability	Amendment	October 2012 May 2007
		(h)	Liability of guardian of estate	New	October 2012
			Delegation	New	May 2007
		(i)	Delegation by guardian of estate	New	October 2012
			Inventory and records	New	May 2007
		(j)	Inventory	New	October 2012
5522	Power to lease			Amendment	May 2007 May 1996
5526	Protection of person dealing with guardian			New	October 2012 May 2007

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(a)	Third party liability	New	October 2012
			General rule	New	May 2007
		(b)	Third party immunity	New	October 2012
			Additional protection	New	May 2007
		(c)	Information regarding guardianship	New	October 2012
	Powers and duties of a guardian of the person			New	Sept. 1974
		(a)	In general	New	Sept. 1974
		(b)	Care and protection of incompetent	New	Sept. 1974
		(c)	Report	New	Sept. 1974
		(d)	Authority of court	New	Sept. 1974
		(e)	Abortion or sterilization	New	Sept. 1974
5527	Compensation of guardians			New	Sept. 1974
5531	When accounting filed			Amendment	October 2012 May 2007 May 1996 June 1977 Sept. 1974
5533	Notice, audits, reviews and distribution			Amendment	June 1977
5533.1	Account of personal representative of deceased incompetent			Repeal	October 1983
				New	May 1973
5536	Distributions of income and principal during incapacity ²³⁷			Amendment (restructured)	Nov. 1975 May 1973
		(a)	In general	Amendment	October 2012 May 2007 March 1981
				Conforming amendment	June 2001
				Amendment (restructured)	Nov. 1975 May 1973

²³⁷ The section heading was changed from “Distributions of income and principal during incompetency” to “Distributions of income and principal during incapacity.”

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Estate plan	Amendment	October 2012 June 1991 Feb. 1988 October 1985 March 1981
				New	Nov. 1975 May 1973
		(c)	Petition and notice	New	October 2012
5537	Reserve for funeral				
		(a)	In general	Amendment	March 1981
5551	Short title of subchapter			New	March 1984
5552	Commonwealth Guardianship Office			New	March 1984
		(a)	Creation	New	March 1984
		(b)	Administrative powers and duties	New	March 1984
		(c)	Powers and duties as guardian	New	March 1984
5553	Guardianship services				
		(a)	In general	Amendment	October 2012
	Undertaking guardianships			New	March 1984
		(a)	Procedure	New	March 1984
		(b)	Monitoring care and progress of incompetent	New	March 1984
		(c)	Costs and compensation	New	March 1984
		(d)	Liability of office	New	March 1984
5554	Cooperation with office			New	March 1984
5556	Guardianship support office			New	May 2007
		(a)	Establishment	New	May 2007
		(b)	Applicability	New	May 2007
		(c)	Powers and duties	New	May 2007
		(d)	Reimbursement	New	May 2007

**Chapter 56
Powers of Attorney**

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 56	Powers of Attorney			Repeal	March 1981
				New	May 1973

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5601	When power of attorney not affected by disability			Repeal	March 1981
				New	May 1973
5602	Other powers of attorney not revoked until notice of death or disability			Repeal	March 1981
				New	May 1973
		(a)	General rule	Repeal	March 1981
				New	May 1973
		(b)	Affidavit of lack of knowledge of revocation	Repeal	March 1981
				New	May 1973
		(c)	Construction of section	Repeal	March 1981
				New	May 1973
Chapter 56	Powers of Attorney			New	March 1981
5601	General provisions				
	General provision			Amendment	June 1991 (restructured)
				New	March 1981
		(a)	General rule	Amendment	Nov. 1998 June 1991
		(b)	Execution	Amendment	June 2011 March 2010 Nov. 1998
				New	June 1991
		(b.1)	Acknowledgment and affidavits	New	June 2011
		(c)	Notice	New	Nov. 1998
			Rule of interpretation	New	June 1991
		(d)	Acknowledgment executed by agent	Amendment	March 2010
				New	Nov. 1998
		(e)	Fiduciary relationship	Amendment	March 2010
				New	Nov. 1998
		(e.1)	Limitation on applicability in commercial transaction	Amendment	June 2011
		(e.2)	Limitation on applicability in health care power of attorney	Amendment	June 2011

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(e.3)	Equity and justice	New	March 2010
		(f)	Definition	New	Nov. 1998
5601.1	Powers of attorney presumed durable			New	June 1991
5601.2	Special rules for gifts			New	Nov. 1998
		(a)	General rule	Amendment	March 2010
				New	Nov. 1998
		(b)	Limited gifts	Amendment	March 2010
				New	Nov. 1998
		(c)	Unlimited gifts	Amendment	March 2010
				New	Nov. 1998
		(c.1)	Other actions not requiring court approval	New	March 2010
		(c.2)	Court-approved gifts and changes to estate plan	New	March 2010
		(d)	Nature of gifts	Amendment	March 2010
				New	Nov. 1998
		(e)	Equity	Repeal	March 2010
				New	Nov. 1998
		(f)	Third party	New	Nov. 1998
		(g)	Court proceeding	New	March 2010
5602	Form of power of attorney			New	March 1981
		(a)	Specification of powers	Amendment	March 2010 Feb. 2002 Nov. 1998 March 1998 April 1994 June 1991
				New	March 1981
		(b)	Appointment of attorney-in-fact and successor attorney	Amendment	Nov. 1998 June 1991
				New	March 1981
		(c)	Filing of power of attorney	Amendment	June 2011 March 2010
				New	March 1981
		(d)	Copy of power of attorney	New	June 2011 March 2010
5603	Implementation of power of attorney			New	March 1981
		(a)	Power to make limited gifts	Amendment	March 2010

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
			Power to make gifts and power to make limited gifts	Amendment	Nov. 1998
				Conforming amendment	June 1991 Feb. 1988 October 1985
				New	March 1981
		(b)	Power to create a trust	Amendment	Nov. 1998
				New	March 1981
		(c)	Power to make additions to an existing trust	Amendment	Nov. 1998
				New	March 1981
		(d)	Power to claim an elective share	Amendment	March 2010 Nov. 1998
				New	March 1981
		(e)	Power to disclaim any interest in property	Conforming amendment	June 2010
				Amendment	March 2010 Nov. 1998
				New	March 1981
		(f)	Power to renounce fiduciary position	Amendment	Nov. 1998
				New	March 1981
		(g)	Power to withdraw and receive	Amendment	Nov. 1998
				New	March 1981
		(h)	Power to authorize admission to medical facility and power to authorize medical procedures	Repeal	March 2010 Feb. 2002 March 1998 April 1994
				Amendment	Nov. 1998
				New	March 1981
		(i)	Power to engage in real property transactions	Amendment	Nov. 1998
				New	June 1991
		(j)	Power to engage in tangible personal property transactions	Amendment	Nov. 1998
				New	June 1991

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(k)	Power to engage in stock, bond and other securities transactions	Amendment	March 2010 Nov. 1998
				New	June 1991
		(l)	Power to engage in commodity and option transactions	Amendment	Nov. 1998
				New	June 1991
		(m)	Power to engage in banking and financial transactions	Amendment	Nov. 1998
				New	June 1991
		(n)	Power to borrow money	Amendment	Nov. 1998
				New	June 1991
		(o)	Power to enter safe deposit boxes	Amendment	Nov. 1998
				New	June 1991
		(p)	Power to engage in insurance transactions	Amendment	March 2010 October 2007 Nov. 1998
				New	June 1991
		(q)	Power to engage in retirement plan transactions	Amendment	March 2010 October 2007 Nov. 1998
				New	June 1991
		(r)	Power to handle interests in estates and trusts	Amendment	Nov. 1998
				New	June 1991
		(s)	Power to pursue claims and litigation	Amendment	Nov. 1998
				New	June 1991
		(t)	Power to receive government benefits	Amendment	Nov. 1998
				New	June 1991
		(u)	Power to pursue tax matters	Amendment	Nov. 1998
				New	June 1991
		(u.1)	Power to make anatomical gift	Repeal	March 2010
				Amendment	Nov. 1998
		(u.2)	Power to operate a business or entity	New	March 2010

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(u.3)	Power to provide for personal and family maintenance	New	March 2010
		(v)	Power to pursue other business and financial matters	New	June 1991
		(w)	Power to exercise in the sole discretion of the attorney-in-fact the most complete and comprehensive powers lawful for a principal to give in connection with his property and financial affairs	New	June 1991
		(x)	Powers generally	New	June 1991
5604	Durable powers of attorney			New	March 1981
		(a)	Definition	Amendment	Nov. 1998 June 1991
				New	March 1981
		(b)	Durable power of attorney not affected by disability or lapse of time	Amendment	Nov. 1998
			Durable power of attorney not affected by disability	Amendment	June 1991 Feb. 1988
				New	March 1981
		(c)	Relation of agent to court-appointed guardian	Amendment	March 2010
			Relation of attorney-in-fact to court-appointed guardian	Amendment	Nov. 1998
				New	March 1981
		(d.1)	Disclosure	New	March 2010
5605	Power of attorney not revoked until notice			New	March 1981
		(a)	Death of principal	Amendment	Nov. 1998
				New	March 1991
		(b)	Disability or incapacity of principal	Amendment	Nov. 1998
				New	March 1981
		(c)	Divorce	Amendment	Nov. 1998
				New	June 1991

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5606	Proof of continuance of powers of attorney by affidavit			Amendment	Nov. 1998
	Proof of continuance of durable or other powers of attorney by affidavit			Amendment	June 1991
				New	March 1981
5607	Corporate attorney-in-fact			Amendment	Nov. 1998
				New	March 1981
5608	Liability				
		(a)	Third party liability	Amendment	June 2011 Nov. 1998
				New	June 1991
		(b)	Third party immunity	Amendment	June 2011 Nov. 1998
				New	June 1991
5609	Compensation and reimbursement for expenses			New	Nov. 1998
		(a)	Compensation	New	Nov. 1998
		(b)	Reimbursement for expenses	New	Nov. 1998
5610	Account			Amendment	March 2010
				New	Nov. 1998
5611	Validity			New	Nov. 1998
5612	Investigation of financial abuse and mismanagement			New	March 2010
5613	Jurisdiction and venue			New	March 2010
		(a)	County having venue	New	March 2010
		(b)	Declining jurisdiction	New	March 2010
5614	Principles of law and equity			New	March 2010
5621	Definitions			New	April 1994
5622	General provisions			New	April 1994
		(a)	Who may execute a health care power of attorney	New	April 1994
		(b)	Execution	New	April 1994
5623	Form of health care power of attorney			New	April 1994
		(a)	Requirements	New	April 1994
		(b)	Optional provisions	New	April 1994

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(c)	Optional form	New	April 1994
5624	Countermand, amendment and revocation			New	April 1994
		(a)	Countermand of health care decision	New	April 1994
		(b)	Amendment and divorce	New	April 1994
		(c)	Revocation	New	April 1994
		(d)	Communication of amendment or revocation	New	April 1994
5625	Resignation of attorney-in-fact			New	April 1994
5626	Operation of health care power of attorney			New	April 1994
		(a)	When operative	New	April 1994
		(b)	Duration	New	April 1994
		(c)	Extent of authority of attorney-in-fact	New	April 1994
		(d)	Life-sustaining treatment decisions	New	April 1994
		(e)	Nutrition and hydration decisions	New	April 1994
		(f)	Health care decisions	New	April 1994
		(g)	Health care information	New	April 1994
		(h)	Court approval unnecessary	New	April 1994
5627	Appointment of health care attorneys-in-fact			New	April 1994
		(a)	Multiple and successor health care attorneys-in-fact	New	April 1994
		(b)	Limitation on appointment of attorney-in-fact	New	April 1994
5628	Relation of health care attorney-in-fact to court-appointed guardian			New	April 1994
		(a)	Accountability of health care attorney-in-fact	New	April 1994
		(b)	Nomination of guardian of person	New	April 1994

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5629	Decisions by health care representative			New	April 1994
		(a)	General rule	New	April 1994
		(b)	Extent of authority of health care representative	New	April 1994
		(c)	Who may act as health care representative	New	April 1994
		(d)	Disqualification	New	April 1994
		(e)	Limitation on designation of health care representative	New	April 1994
		(f)	Decision of health care representative	New	April 1994
		(g)	Alternate health care representative	New	April 1994
		(h)	Duty of health care representative	New	April 1994
		(i)	Countermand of health care decision	New	April 1994
		(j)	Court approval unnecessary	New	April 1994
		(k)	Written declaration of health care representative	New	April 1994
5630	Duties of attending physician and health care provider			New	April 1994
		(a)	Communication of health care decision	New	April 1994
		(b)	Compliance with decisions of health care attorney-in-fact or health care representative	New	April 1994
		(c)	Medical record	New	April 1994
		(d)	Medical record entry	New	April 1994
		(e)	Record of determination	New	April 1994
5631	Immunities			New	April 1994
		(a)	Attending physician, health care provider and health care institution	New	April 1994
		(b)	Health care attorney-in-fact	New	April 1994

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(c)	Health care representative	New	April 1994
		(d)	Death not suicide or homicide	New	April 1994
5632	Unwillingness to comply and transfer of principal			New	April 1994
		(a)	Attending physician or health care provider	New	April 1994
		(b)	Liability	New	April 1994
5633	Effect on life insurance			New	April 1994
5634	Conditioning services or action			New	April 1994
5635	Penalties			New	April 1994
		(a)	Tampering with a health care power of attorney	New	April 1994
		(b)	Tampering resulting in death	New	April 1994
5636	Effect on other State law			New	April 1994
		(a)	Health care decision	New	April 1994
		(b)	Mental health	New	April 1994
		(c)	Prohibited care	New	April 1994
		(d)	Notice	New	April 1994
		(e)	Consent	New	April 1994
		(f)	Preservation of religious rights	New	April 1994
		(g)	Individual's rights	New	April 1994
5637	Conflicting health care powers of attorney			New	April 1994
5638	Validity			New	April 1994

Chapter 57
Absentees and Presumed Decedents

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5701	Proof of death				
		(e)	Distribution of an estate or trust	New	Nov. 1975
5704	Notice to absentee			Amendment	June 1991 Feb. 1988

Chapter 61
Estates

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
6101	Definitions			Conforming amendment	April 2005
				Amendment	June 1977 Nov. 1975
6102	Termination of trusts			Repeal	April 2005 Nov. 2003
		(a)	Failure of original purpose	Repeal	April 2005 Nov. 2003
				Amendment	March 1981 May 1979 June 1977 Nov. 1975
		(b)	Distribution of terminated trust	Repeal	April 2005 Nov. 2003
		(c)	Other powers	Repeal	April 2005 Nov. 2003
6103	Release or disclaimer of powers or interests			Repeal	June 2010
		(a)	Powers and interests releasable	Repeal	June 2010
				Amendment	Nov. 1975
		(b)	Form of release or disclaimer	Repeal	June 2010
				Amendment	May 1973
		(c)	Delivery of release or disclaimer	Repeal	June 2010
		(d)	Grantee or lienholder	Repeal	June 2010
6103.1	Release of powers and interests and disclaimer of powers			New	June 2010
		(a)	Interests releasable	New	June 2010
		(b)	Effect of release of interest	New	June 2010
		(c)	Nonfiduciary powers disclaimable or releasable	New	June 2010
		(d)	Fiduciary powers disclaimable or releasable	New	June 2010
		(e)	Terms of disclaimer or release	New	June 2010
		(f)	Date of effect	New	June 2010
		(g)	Procedural requirements	New	June 2010

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
6104	Rule against perpetuities				
		(b)	Void interest; exceptions	Amendment	April 2005
		(d)	Applicability	New	June 1977
6106	Income accumulations; when void				
		(b)	Void accumulations; exceptions	Amendment	April 2005
6107.1	Applicability of rule against perpetuities				
		(b)	Modern rule	Amendment	October 2007
6109	Combination of charitable trusts			Repeal	May 1979
6110	Administration of charitable interests			Repeal	April 2005 Nov. 2003
	Administration of charitable estates			Amendment	April 1994
		(a)	General rule	Amendment	April 1994 March 1981
		(b)	Administrative termination of small charitable trusts	New	March 1981
		(c)	Judicial termination of charitable trusts	New	March 1981
6111	Conveyances to defeat marital rights			Repeal	June 1977 Nov. 1975
		(d)	Procedure	Amendment	May 1973
6111.1	Modification by divorce			Amendment	October 2007 June 1991 Feb. 1988 October 1985
				New	June 1977 Nov. 1975
6111.2	Effect of divorce on designation of beneficiaries			Amendment	October 2007 April 1994
				New	June 1991 Feb. 1988
6112	Spendthrift trusts			Repeal	April 2005 Nov. 2003
6114	Rules of interpretation			Conforming amendment	April 2005 Nov. 2003
				Amendment	June 1991 Feb. 1988 October 1985 Nov. 1975

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
6117	Rule in Shelley's case and doctrine of worthier title			Amendment	April 1994
		(b)	Doctrine of worthier title	New	April 1994
6118	Invalidity of certain gifts			Repeal	Nov. 1975
6119	Invalidity of certain gifts			Repeal and New ²³⁸	May 1973

Chapter 62 Disclaimers

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 62	Disclaimers			New	Nov. 1975
6201	Right to disclaim			Amendment	April 1994 October 1983
				New	Nov. 1975
6202	Disclaimers by fiduciaries or attorneys-in-fact			Amendment	October 1983
	Disclaimers by fiduciaries			Amendment	March 1981
				New	Nov. 1975
6203	Interests subject to disclaimer			New	Nov. 1975
6204	Filing, delivery and recording			New	Nov. 1975
		(a)	Will or intestacy	New	Nov. 1975
		(b)	Inter vivos transfers	New	Nov. 1975
		(b.1)	Third party disclaimer	New	October 1983
		(c)	Powers of appointment	New	Nov. 1975
		(d)	Real estate	New	Nov. 1975
6205	Effect of disclaimer			New	Nov. 1975
		(a)	In general	Amendment	June 2001 October 1983
				New	Nov. 1975
		(b)	Rights of other parties	Amendment	October 1983
				New	Nov. 1975

²³⁸ See *supra* note 61.

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(c)	Powers of appointment	New	Nov. 1975
		(d)	Rights of creditors of disclaimant	New	June 2001
6206	Bar to disclaimer			New	Nov. 1975
		(a)	Acceptance	New	Nov. 1975
		(b)	Partial acceptance within six months	Amendment	October 1983
				New	Nov. 1975
		(c)	Partial acceptance after six months	New	Nov. 1975
6207	Other statutes			New	Nov. 1975

Chapter 63 Multiple-Party Accounts

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 63	Multiple-Party Accounts			New	Nov. 1975
6301	Definitions			New	Nov. 1975
6302	Applicability of chapter			New	Nov. 1975
6303	Ownership during lifetime			New	Nov. 1975
		(a)	Joint account	New	Nov. 1975
		(b)	Trust account	New	Nov. 1975
6304	Right of survivorship			New	Nov. 1975
		(a)	Joint account	New	Nov. 1975
		(b)	Trust account	New	Nov. 1975
		(c)	Other cases	New	Nov. 1975
		(d)	Change by will prohibited	New	Nov. 1975
6305	Form of account			New	Nov. 1975
6305.1	Account form			New	October 1985 October 1983
		(a)	Financial institution to provide account form	New	October 1985 October 1983
		(b)	Form as conclusive evidence	New	October 1985 October 1983
6306	Accounts and transfers nontestamentary			New	Nov. 1975

Chapter 71
Trust Estates

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 71	Trust Estates			Repeal	April 2005 Nov. 2003
7104	Power of trustee to resign			New	June 2001
		(a)	Court approval	New	June 2001
		(b)	Without court approval if authorized by governing instrument	New	June 2001
		(c)	When individual trustee may resign without court approval and without authorization in governing instrument	New	June 2001
		(d)	Liability	New	June 2001
		(e)	Definition	New	June 2001
7105	Filing resignations and appointments			New	June 2001
7121	Grounds and procedures			Amendment	March 1981
7133	Powers, duties and liabilities identical with personal representatives			Amendment	March 1981
7134	Investments			Conforming amendment	March 1998
7137	Limitations on powers				
		(a)	In general	New	March 1998
		(b)	Definition	New	March 1998
		(c)	When section not applicable	New	March 1998
		(d)	Trust reference	New	March 1998
7143	Title of purchaser			Amendment	March 1981
7181	When account filed			Amendment	June 1977
7183	Notice, audits, reviews, and distribution			Amendment	April 1994 October 1983 March 1981 May 1979 Nov. 1975
7185	Compensation				

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Allowed out of principal or income	Amendment	March 1981
7186	Failure to present claim at audit			Amendment (restructured)	March 1981
7187	Interest or income on distributive shares			Amendment	May 1979
7188	Annexation of account of distributed estate or trust			Amendment	June 1991 Feb. 1988 October 1985
				New	Nov. 1975
7191	Separate trusts			Amendment	June 1991 Feb. 1988
		(a)	Without court approval	New	March 1998
		(b)	With court approval	Amendment	March 1998
		(c)	Separate fund	New	March 1998
7192	Combination of trusts			Amendment	May 1979

Chapter 72 Prudent Investor Rule

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 72	Prudent Investor Rule			New	March 1998
7201	Definitions			Amendment	April 2005
				New	March 1998
7202	Default rule			New	March 1998
		(a)	General rule	New	March 1998
		(b)	Exception	New	March 1998
		(c)	Court direction	New	March 1998
7203	Prudent investor rule			New	March 1998
		(a)	General rule	New	March 1998
		(b)	Permissible investments	New	March 1998
		(c)	Considerations in making investments and management decisions	New	March 1998
7204	Diversification			New	March 1998
7205	Retention of inception assets			New	March 1998
7206	Delegation			New	March 1998
		(a)	Permissible delegation	New	March 1998
		(b)	Duties of fiduciary	New	March 1998

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(c)	Duties of investment agent	New	March 1998
		(d)	Jurisdiction	New	March 1998
		(e)	When co-fiduciary may delegate to another co-fiduciary	New	March 1998
		(f)	Mutual funds	New	March 1998
7207	Retention of cash; temporary investments			New	March 1998
		(a)	Uninvested cash	New	March 1998
		(b)	Temporary investments	New	March 1998
7208	Life insurance			New	March 1998
7209	Mutual funds			New	March 1998
7210	Common trust fund and mortgage investment fund			New	March 1998
7211	Further investment authority			New	March 1998
7212	Degree of care			New	March 1998
7213	Judgment of fiduciary's decisions			New	March 1998
7214	Language invoking chapter			New	March 1998

**Chapter 73
Municipalities Investments**

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 73	Fiduciaries Investments			Conforming amendment	March 1998
7301	Definition of fiduciary			Conforming amendment	March 1998
7302	Authorized investments; in general				
		(b)	Prudent man rule	Amendment	May 1973
7310	Stocks				
		(a)	Preferred and common stock	Amendment	May 1973
7314	Common trust fund and mortgage investment fund			Amendment	October 1983
7314.1	Mutual funds			Amendment	April 2005
				New	June 1991

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
7315	Retention of investments			Amendment	October 1983
7315.1	Retention of cash; temporary investments			New	October 1983
		(a)	Uninvested cash	New	October 1983
		(b)	Temporary investments	Amendment	June 1991 Feb. 1988 October 1985
				New	October 1983
7319	Directions of testator or settlor				
		(b)	Exception; failure of purpose	Amendment	May 1973

Chapter 75
Limitations on Exercise of Trustee Powers and Powers of Beneficiaries to Appoint Trustees

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
7503	Application of chapter				
		(b)	Exclusion	Amendment	April 2005 Nov. 2003
7504	Certain trustee powers not exercisable				
		(c)	Exceptions	New	April 2005 Nov. 2003
7506	Certain powers of beneficiaries not exercisable				
		(a)	General rule	Amendment	April 2005 Nov. 2003
		(b)	Exception	Amendment	April 2005 Nov. 2003

Chapter 76
Powers of Appointment

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 76	Powers of Appointment			New	June 2010
7601	Definitions			New	June 2010
7602	Exercise of powers of appointment			New	June 2010

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(a)	Broad power of appointment	New	June 2010
		(b)	Limited power of appointment	New	June 2010
		(c)	Necessity of donee's specific reference to power	New	June 2010
		(d)	Exercise before testamentary power granted	New	June 2010
		(e)	Testamentary powers	New	June 2010
7603	Contract to exercise power			New	June 2010
		(a)	Contract prohibited	New	June 2010
		(b)	Actions for recovery	New	June 2010
		(c)	No limitation on disclaimer or release	New	June 2010
7604	Manner of appointment			New	June 2010
		(a)	Outright or in trust	New	June 2010
		(b)	Exclusive and nonexclusive powers	New	June 2010
7605	Anti-lapse provision			New	June 2010
		(a)	General rule	New	June 2010
		(b)	Lapsed share of residue	New	June 2010
7606	Partially effective exercise			New	June 2010
7607	Creditors' rights			New	June 2010

Chapter 77 Trusts

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 77	Trusts			New	April 2005 Nov. 2003
7701	Short title - UTC 101			New	April 2005 Nov. 2003
7702	Scope - UTC 102			New	April 2005 Nov. 2003
7703	Definitions - UTC 103			New	April 2005 Nov. 2003
7704	Knowledge - UTC 104			New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(a)	When person has knowledge	New	April 2005 Nov. 2003
		(b)	Employees	New	April 2005 Nov. 2003
7705	Trust instrument controls; mandatory rules - UTC 105			New	April 2005 Nov. 2003
		(a)	Trust instrument controls	New	April 2005 Nov. 2003
		(b)	Mandatory rules	New	April 2005 Nov. 2003
7706	Common law of trusts; principles of equity - UTC 106			New	April 2005 Nov. 2003
7707	Governing law - UTC 107			New	April 2005 Nov. 2003
7708	Situs of trust			New	April 2005 Nov. 2003
		(a)	Specified in trust instrument	New	April 2005 Nov. 2003
		(b)	Unspecified in trust instrument	New	April 2005 Nov. 2003
		(c)	Transfer	New	April 2005 Nov. 2003
		(d)	Notice of transfer	New	April 2005 Nov. 2003
		(e)	Consent to transfer	New	April 2005 Nov. 2003
		(f)	Successor trustee	New	April 2005 Nov. 2003
		(g)	Court-directed change in situs	New	April 2005 Nov. 2003
		(h)	Claims not discharged	New	April 2005 Nov. 2003
7709	Methods and waiver of notice - UTC 109			New	April 2005 Nov. 2003
		(a)	Notice generally	New	April 2005 Nov. 2003
		(b)	Unknown identity or location	New	April 2005 Nov. 2003
		(c)	Waiver	New	April 2005 Nov. 2003
		(d)	Notice of judicial proceeding	New	April 2005 Nov. 2003
7710	Notice; others treated as beneficiaries - UTC 110			New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(a)	Notice	New	April 2005 Nov. 2003
		(b)	Enforcement by charitable organization expressly named in instrument	New	April 2005
			Charitable organization and others	New	Nov. 2003
		(c)	Enforcement by others	New	April 2005
			Office of Attorney General	New	Nov. 2003
		(d)	Office of Attorney General	New	April 2005
7710.1	Nonjudicial settlement agreements - UTC 111			New	April 2005 Nov. 2003
		(a)	(Reserved)	New	April 2005 Nov. 2003
		(b)	General rule	New	April 2005 Nov. 2003
		(c)	Exception	Amendment	June 2010
				New	April 2005 Nov. 2003
		(d)	Matters that may be resolved	New	April 2005 Nov. 2003
		(e)	Request of court	New	April 2005 Nov. 2003
7710.2	Rules of construction - UTC 112			New	April 2005 Nov. 2003
7711	Role of court in administration of trust - UTC 201			New	April 2005 Nov. 2003
		(a)	Judicial intervention	New	April 2005 Nov. 2003
		(b)	Judicial supervision	New	April 2005 Nov. 2003
		(c)	Scope of proceeding	New	April 2005 Nov. 2003
7712	Jurisdiction over trustee and beneficiary - UTC 202			New	April 2005 Nov. 2003
		(a)	Personal jurisdiction over trustee	New	April 2005 Nov. 2003
		(b)	Personal jurisdiction over beneficiary	New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(c)	Additional jurisdictional methods	New	April 2005 Nov. 2003
7713	(Reserved)			New	April 2005 Nov. 2003
7714	Venue - UTC 204			New	April 2005 Nov. 2003
		(a)	General rule	New	April 2005 Nov. 2003
		(b)	Exceptions	New	April 2005 Nov. 2003
7721	Scope; definition of trust matter			New	April 2005 Nov. 2003
		(a)	Scope	New	April 2005 Nov. 2003
		(b)	Definition	New	April 2005 Nov. 2003
7722	Representation of parties in interest in general			New	April 2005 Nov. 2003
		(a)	Judicial proceeding	Amendment	June 2010
				New	April 2005 Nov. 2003
		(b)	Nonjudicial resolution	Amendment	June 2010
				New	April 2005 Nov. 2003
		(c)	Permissible consideration	Amendment	June 2010
				New	April 2005 Nov. 2003
		(d)	Certification of representation	New	June 2010
7723	Representatives and persons represented			New	April 2005 Nov. 2003
7724	Appointment of representative			New	April 2005 Nov. 2003
7725	Notice of representation			Amendment	October 2007
				New	April 2005 Nov. 2003
7726	Representation ineffective if person objects			New	April 2005
	Representation ineffective if person timely objects			New	Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
7731	Creation of trust - UTC 401			New	April 2005 Nov. 2003
7732	Requirements for creation - UTC 402			New	April 2005 Nov. 2003
		(a)	Requirements	New	April 2005 Nov. 2003
		(b)	(Reserved)	New	April 2005 Nov. 2003
		(b.1)	Signature by mark or another	New	April 2005 Nov. 2003
		(c)	Power to select beneficiary from indefinite class	New	April 2005 Nov. 2003
		(d)	Definition	New	April 2005 Nov. 2003
7733	Written trusts created in other jurisdictions - UTC 403			New	April 2005 Nov. 2003
7734	Trust purposes - UTC 404			New	April 2005 Nov. 2003
7735	Charitable purposes; enforcement - UTC 405			New	April 2005 Nov. 2003
		(a)	Purposes	New	April 2005 Nov. 2003
		(b)	Selection by court	New	April 2005 Nov. 2003
		(c)	Proceeding to enforce trust	New	April 2005 Nov. 2003
7736	Creation of trust induced by fraud, duress or undue influence - UTC 406			New	April 2005 Nov. 2003
7737	Oral trusts unenforceable			New	April 2005 Nov. 2003
7738	Trust for care of animal - UTC 408			New	April 2005 Nov. 2003
		(a)	Creation and termination	New	April 2005 Nov. 2003
		(b)	Enforcement	New	April 2005 Nov. 2003
		(c)	Limitation	New	April 2005 Nov. 2003
7739	Noncharitable trust without ascertainable beneficiary - UTC 409			New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
7740	Termination of trusts; proceedings for termination or modification of trusts - UTC 410			New	April 2005 Nov. 2003
		(a)	Termination	New	April 2005 Nov. 2003
		(b)	Proceedings for termination or modification	New	April 2005 Nov. 2003
7740.1	Modification or termination of noncharitable irrevocable trust by consent - UTC 411			New	April 2005 Nov. 2003
		(a)	Consent by settlor and beneficiaries	New	April 2005 Nov. 2003
		(b)	Consent by beneficiaries with court approval	New	April 2005 Nov. 2003
		(b.1)	Spendthrift provision	New	April 2005
		(c)	Distribution upon termination	New	April 2005
			Spendthrift provision	New	Nov. 2003
		(d)	Consent by some beneficiaries with court approval	New	April 2005
			Distribution upon termination	New	Nov. 2003
		(e)	Consent by some beneficiaries with court approval	New	Nov. 2003
7740.2	Modification or termination of noncharitable irrevocable trust by court - UTC 412			New	April 2005 Nov. 2003
		(a)	Unanticipated circumstances	New	April 2005 Nov. 2003
		(b)	Inability to administer effectively	New	April 2005 Nov. 2003
		(c)	Distribution of property	New	April 2005 Nov. 2003
7740.3	Charitable trusts - UTC 413			New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(a)	General rule	New	April 2005 Nov. 2003
		(b)	Exception	New	April 2005 Nov. 2003
		(c)	Administrative deviation	New	April 2005 Nov. 2003
		(d)	Administrative termination of small charitable trusts	New	April 2005 Nov. 2003
		(e)	Judicial termination of charitable trusts	New	April 2005 Nov. 2003
7740.4	Modification or termination of noncharitable trust - UTC 414			New	April 2005 Nov. 2003
		(a)	Trustee's authority	New	April 2005 Nov. 2003
		(b)	Court authority	New	April 2005 Nov. 2003
		(c)	Distribution of trust property	New	April 2005 Nov. 2003
7740.5	Reformation to correct mistakes - UTC 415			New	April 2005 Nov. 2003
7740.6	Modification to achieve settlor's tax objectives - UTC 416			New	April 2005 Nov. 2003
7740.7	Division of trusts			New	April 2005 Nov. 2003
		(a)	Without court approval	New	April 2005 Nov. 2003
		(b)	With court approval	Amendment	June 2010
				New	April 2005 Nov. 2003
		(c)	Separate fund	New	April 2005 Nov. 2003
7740.8	Combination of trusts			New	April 2005 Nov. 2003
		(a)	With court approval	New	April 2005 Nov. 2003
		(b)	Without court approval	New	April 2005 Nov. 2003
7741	Rights of beneficiary's creditor or assignee - UTC 501			New	April 2005 Nov. 2003
7742	Spendthrift provision - UTC 502			New	April 2005 Nov. 2003
		(a)	Validity	New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Creation	New	April 2005 Nov. 2003
		(c)	Effect	New	April 2005 Nov. 2003
7743	Exceptions to spendthrift provision - UTC 503			New	April 2005 Nov. 2003
		(a)	(Reserved)	New	April 2005 Nov. 2003
		(b)	Who may override	New	April 2005 Nov. 2003
		(c)	Remedy if unenforceable	New	April 2005
			When unenforceable	New	Nov. 2003
		(d)	Definition	New	April 2005 Nov. 2003
7744	Discretionary trusts; effect of standard - UTC 504			New	April 2005 Nov. 2003
		(a)	(Reserved)	New	April 2005 Nov. 2003
		(b)	Distribution not compelled	New	April 2005 Nov. 2003
		(c)	Exception	New	April 2005 Nov. 2003
		(d)	Proceeding against trustee	New	April 2005 Nov. 2003
		(e)	(Reserved)	New	April 2005
			Definition	New	Nov. 2003
		(f)	Definition	New	April 2005
7745	Creditor's claim against settlor - UTC 505(a)			Amendment	October 2007
				New	April 2005
	Creditor's claim against settlor - UTC 505			New	Nov. 2003
		(a)	General rule	New	Nov. 2003
		(b)	Holder of power of withdrawal	New	Nov. 2003
7746	Overdue distribution - UTC 506			New	April 2005 Nov. 2003
		(a)	Distribution not made within reasonable time	New	April 2005
		(b)	Definition	New	April 2005
7747	Personal obligations of trustee - UTC 507			New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
7748	Property subject to power of withdrawal - UTC 505(b)			New	April 2005
7751	Capacity of settlor of revocable trust - UTC 601			New	April 2005 Nov. 2003
7752	Revocation or amendment of revocable trust - UTC 602			New	April 2005 Nov. 2003
		(a)	Power to revoke or amend	New	April 2005 Nov. 2003
		(b)	More than one settlor	New	April 2005 Nov. 2003
		(c)	How to revoke or amend	New	April 2005 Nov. 2003
		(d)	Delivery of property	New	April 2005 Nov. 2003
		(e)	Agent	New	April 2005 Nov. 2003
		(f)	Guardian	New	April 2005 Nov. 2003
		(g)	Liability	New	April 2005 Nov. 2003
7753	Trustee's duties; powers of withdrawal - UTC 603			New	April 2005 Nov. 2003
		(a)	Power of settlor	New	April 2005 Nov. 2003
		(b)	Holder of power of withdrawal	New	April 2005 Nov. 2003
7754	Actions contesting validity of revocable trusts			New	April 2005 Nov. 2003
		(a)	How action may be commenced	New	April 2005 Nov. 2003
		(b)	Time limit	New	April 2005 Nov. 2003
		(c)	Grounds for contest	New	April 2005 Nov. 2003
		(d)	Competency of witnesses	New	October 2007
7755	Claims and distribution after settlor's death			New	April 2005 Nov. 2003
		(a)	Creditors' rights	New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Enforcement of claim against revocable trust	New	April 2005 Nov. 2003
		(c)	No personal representative	Repeal	June 2010 October 2007
				New	April 2005 Nov. 2003
			Trustee's duty to advertise	New	June 2010 October 2007
		(d)	Liability of personal representative	New	April 2005 Nov. 2003
		(e)	Liability to any creditor	New	April 2005 Nov. 2003
		(f)	Rights of creditors against distributed property	New	April 2005 Nov. 2003
		(g)	Judicial principles	New	April 2005 Nov. 2003
7761	Accepting or declining trusteeship - UTC 701			New	April 2005 Nov. 2003
		(a)	Accepting trusteeship	New	April 2005 Nov. 2003
		(b)	Rejecting trusteeship	New	April 2005 Nov. 2003
		(c)	Actions not constituting acceptance of trusteeship	New	April 2005 Nov. 2003
7762	Trustee's bond - UTC 702			New	April 2005 Nov. 2003
		(a)	When required	New	April 2005 Nov. 2003
		(b)	Judicial authority	New	April 2005 Nov. 2003
		(c)	Institutional trustees	New	April 2005 Nov. 2003
7763	Cotrustees - UTC 703			New	April 2005 Nov. 2003
		(a)	Majority decision	New	April 2005 Nov. 2003
		(a.1)	When no majority	New	April 2005 Nov. 2003
		(b)	Vacancy	New	April 2005 Nov. 2003
		(c)	Performance	New	April 2005 Nov. 2003
		(d)	Unavailability	New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(e)	(Reserved)	New	April 2005 Nov. 2003
		(f)	Liability	New	April 2005 Nov. 2003
		(g)	Reasonable care	New	April 2005 Nov. 2003
		(h)	Dissenting trustee	New	April 2005 Nov. 2003
7764	Vacancy in trusteeship; appointment of successor - UTC 704			New	April 2005 Nov. 2003
		(a)	When vacancy occurs	New	April 2005 Nov. 2003
		(b)	Filling of vacancy	New	April 2005 Nov. 2003
		(c)	Filling vacancy for noncharitable trust	New	April 2005 Nov. 2003
		(d)	Filling vacancy for charitable trust	New	April 2005 Nov. 2003
		(e)	Appointment by court	New	April 2005 Nov. 2003
		(f)	Filing appointment	New	April 2005 Nov. 2003
7765	Resignation of trustee; filing resignation			New	April 2005 Nov. 2003
		(a)	Court approval	Repeal	June 2010
				New	April 2005 Nov. 2003
		(a.1)	General rule	New	June 2010
		(b)	Without court approval if authorized by trust instrument	Repeal	June 2010
				New	April 2005 Nov. 2003
		(c)	Without court approval and without authorization in trust instrument	Repeal	June 2010
				New	April 2005
			When individual trustee may resign without court approval and without authorization in trust instrument	New	Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(d)	Liability	New	April 2005 Nov. 2003
		(e)	Filing resignation	New	April 2005 Nov. 2003
7766	Removal of trustee - UTC 706			New	April 2005 Nov. 2003
		(a)	Request to remove trustee; court authority	New	April 2005 Nov. 2003
		(b)	When court may remove trustee	New	April 2005 Nov. 2003
		(c)	Court remedies	New	April 2005 Nov. 2003
		(d)	Procedure	New	April 2005 Nov. 2003
7767	Delivery of property by former trustee - UTC 707			New	April 2005 Nov. 2003
		(a)	Duties and powers of trustee	New	April 2005 Nov. 2003
		(b)	Delivery of trust property	New	April 2005 Nov. 2003
7768	Compensation of trustee - UTC 708			New	April 2005 Nov. 2003
		(a)	If unspecified	New	April 2005 Nov. 2003
		(b)	If specified; adjustment	New	April 2005 Nov. 2003
		(c)	Entitlement not barred	New	April 2005 Nov. 2003
		(d)	Court authority	New	April 2005 Nov. 2003
		(e)	Cemetery lots	New	April 2005 Nov. 2003
7769	Reimbursement of expenses - UTC 709			New	April 2005 Nov. 2003
		(a)	Reimbursement from trust property	New	April 2005 Nov. 2003
		(b)	Advance	New	April 2005 Nov. 2003
7770	Liability of successor trustee			New	April 2005 Nov. 2003
7771	Duty to administer trust - UTC 801			New	April 2005 Nov. 2003
7772	Duty of loyalty - UTC 802			New	April 2005 Nov. 2003
		(a)	Duty of trustee	New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Effect of conflict of interest	New	April 2005 Nov. 2003
		(c)	What constitutes conflict of interest	New	April 2005 Nov. 2003
		(d)	Transactions between trustee and beneficiary	New	April 2005 Nov. 2003
		(e)	Conflict regarding trust opportunity	New	April 2005 Nov. 2003
		(f)	(Reserved)	New	April 2005 Nov. 2003
		(g)	Business enterprises	New	April 2005 Nov. 2003
		(h)	Permissible transactions	New	April 2005 Nov. 2003
		(i)	(Reserved)	New	April 2005 Nov. 2003
7773	Impartiality - UTC 803			New	April 2005 Nov. 2003
7774	Prudent administration - UTC 804			New	April 2005 Nov. 2003
7775	Costs of administration - UTC 805			New	April 2005 Nov. 2003
7776	Trustee's skills - UTC 806			New	April 2005 Nov. 2003
7777	Delegation by trustee			New	April 2005 Nov. 2003
		(a)	Standards for delegation	New	April 2005 Nov. 2003
		(b)	Agent's duty	New	April 2005 Nov. 2003
		(c)	Liability	New	April 2005 Nov. 2003
		(d)	Jurisdiction	New	April 2005 Nov. 2003
		(e)	When one trustee may delegate to another	New	April 2005 Nov. 2003
7778	Powers to direct - UTC 808			New	April 2005 Nov. 2003
		(a)	Direction of settlor	New	April 2005 Nov. 2003
		(b)	Compliance with power	New	April 2005 Nov. 2003
		(c)	Modification or termination of trust	New	April 2005 Nov. 2003
		(d)	Fiduciary relationship	New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
7779	Control and protection of trust property - UTC 809			New	April 2005 Nov. 2003
7780	Recordkeeping and identification of trust property - UTC 810			New	April 2005 Nov. 2003
		(a)	Records	New	April 2005 Nov. 2003
		(b)	Commingling trust property prohibited	New	April 2005 Nov. 2003
		(c)	Designating trust property	New	April 2005 Nov. 2003
		(d)	Investing property of separate trusts	New	April 2005 Nov. 2003
7780.1	Enforcement and defense of claims - UTC 811			New	April 2005 Nov. 2003
7780.2	(Reserved)				April 2005 Nov. 2003
7780.3	Duty to inform and report			New	April 2005 Nov. 2003
		(a)	Duty to respond to requests	Amendment	October 2007
				New	April 2005 Nov. 2003
		(b)	Notice after settlor of revocable trust has been adjudicated incapacitated	New	April 2005 Nov. 2003
		(c)	Notice after settlor of revocable trust has died	New	April 2005 Nov. 2003
		(d)	Notice after settlor of irrevocable trust has been adjudicated incapacitated	New	April 2005 Nov. 2003
		(e)	Notice after settlor of irrevocable trust has died	New	April 2005 Nov. 2003
		(f)	Notice to current beneficiaries	Amendment	October 2007
				New	April 2005 Nov. 2003
		(g)	Change in trusteeship	Amendment	October 2007
				New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(h)	Trustee's notice to any beneficiary at any time	New	April 2005 Nov. 2003
		(i)	Contents of notice	Amendment	October 2007
				New	April 2005 Nov. 2003
		(j)	Waiver	New	April 2005 Nov. 2003
		(k)	Notice to settlor's appointee	Amendment	October 2007
				New	April 2005
			Applicability	New	Nov. 2003
		(k.1)	Nomination by current beneficiary	New	June 2010
		(l)	Applicability	Amendment	October 2007
				New	April 2005
7780.4	Discretionary powers			New	April 2005 Nov. 2003
7780.5	Powers of trustees - UTC 815			New	April 2005 Nov. 2003
		(a)	Exercise of power	New	April 2005 Nov. 2003
		(b)	(Reserved)	New	April 2005 Nov. 2003
7780.6	Illustrative powers of trustee			New	April 2005 Nov. 2003
		(a)	Listing	Amendment	October 2007
				New	April 2005 Nov. 2003
		(b)	Effect	New	April 2005 Nov. 2003
7780.7	Distribution upon termination			New	April 2005 Nov. 2003
7781	Remedies for breach of trust - UTC 1001			New	April 2005 Nov. 2003
		(a)	What constitutes breach of trust	New	April 2005 Nov. 2003
		(b)	Remedies	New	April 2005 Nov. 2003
7782	Damages for breach of trust - UTC 1002			New	April 2005 Nov. 2003
		(a)	Liability for breach of trust	New	April 2005
			Amount of damages	New	Nov. 2003
		(b)	Contribution	New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
7783	Damages in absence of breach - UTC 1003			New	April 2005 Nov. 2003
		(a)	Profit	New	April 2005 Nov. 2003
		(b)	Loss or depreciation	New	April 2005 Nov. 2003
7784	(Reserved)			New	April 2005 Nov. 2003
7785	Limitation of action against trustee			New	April 2005 Nov. 2003
		(a)	Imposed by trustee's written reports	Amendment	October 2007
				New	April 2005
			(Reserved)	New	Nov. 2003
		(a.1)	Imposed by trustee's written reports	New	Nov. 2003
		(b)	Five-year absolute bar	New	April 2005
			(Reserved)	New	Nov. 2003
		(c)	Five-year absolute bar	New	Nov. 2003
7786	Reliance on trust instrument - UTC 1006			New	April 2005 Nov. 2003
7787	Event affecting administration or distribution - UTC 1007			New	April 2005 Nov. 2003
7788	Exculpation of trustee - UTC 1008			New	April 2005 Nov. 2003
		(a)	When exculpatory provision unenforceable	New	April 2005 Nov. 2003
		(b)	Exculpatory provision by trustee	New	April 2005 Nov. 2003
7789	Beneficiary's consent, release or ratification - UTC 1009			New	April 2005 Nov. 2003
7790	Limitation on personal liability of trustee - UTC 1010			New	April 2005 Nov. 2003
		(a)	When trustee not personally liable	New	April 2005 Nov. 2003
		(b)	When trustee personally liable	New	April 2005 Nov. 2003
		(c)	Assertion of claim	New	April 2005 Nov. 2003
7790.1	Interest as general partner - UTC 1011			New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(a)	Contractual liability	New	April 2005 Nov. 2003
		(b)	Tortious liability	New	April 2005 Nov. 2003
		(c)	When immunity inapplicable	New	April 2005 Nov. 2003
		(d)	Personal liability of settlor	New	April 2005 Nov. 2003
7790.2	Protection of person dealing with trustee - UTC 1012			New	April 2005 Nov. 2003
		(a)	(Reserved)	New	April 2005 Nov. 2003
		(a.1)	Protection from liability	New	April 2005 Nov. 2003
		(b)	No requirement to inquire	New	April 2005 Nov. 2003
		(c)	(Reserved)	New	April 2005 Nov. 2003
		(c.1)	Ultra vires	New	April 2005 Nov. 2003
		(d)	Former trustee	New	April 2005 Nov. 2003
		(e)	Effect of other laws	New	April 2005 Nov. 2003
7790.3	Certification of trust - UTC 1013			New	April 2005 Nov. 2003
		(a)	Contents of certification	New	April 2005 Nov. 2003
		(b)	Authentication	New	April 2005 Nov. 2003
		(c)	Assurance of representations	New	April 2005 Nov. 2003
		(d)	Dispositive trust provisions	New	April 2005 Nov. 2003
		(e)	Provisions to be made available upon request	New	April 2005 Nov. 2003
		(f)	Reliance on certification	New	April 2005 Nov. 2003
		(g)	Enforcement	New	April 2005 Nov. 2003
		(h)	Liability	New	April 2005 Nov. 2003
		(i)	Applicability	New	April 2005 Nov. 2003
7791	Abandonment of property			New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
7792	Powers, duties and liabilities identical with personal representatives			Amendment	June 2010
				New	April 2005 Nov. 2003
7793	Effect of removal, or of probate of later will or codicil			New	April 2005 Nov. 2003
		(a)	No impeachment	New	April 2005 Nov. 2003
		(b)	Good faith dealings	New	April 2005 Nov. 2003
7794	Title of purchaser			New	April 2005 Nov. 2003
7795	Reports for school district trustee			New	April 2005 Nov. 2003
		(a)	Scope	New	April 2005 Nov. 2003
		(b)	Requirement	New	April 2005 Nov. 2003
7796	Jurisdiction			New	April 2005 Nov. 2003
7797	Filing accounts			New	April 2005 Nov. 2003
		(a)	When to file	New	April 2005 Nov. 2003
		(b)	Where to file	New	April 2005 Nov. 2003
7798	Failure to present claim or audit			New	April 2005 Nov. 2003
		(a)	Applicability	New	April 2005 Nov. 2003
		(b)	Bar	New	April 2005 Nov. 2003
		(c)	Liens and charges unimpaired	New	April 2005 Nov. 2003
7799	Income on distributive shares			New	April 2005 Nov. 2003
7799.1	Annexation of account of distributed estate or trust			New	April 2005 Nov. 2003
7799.2	Accounts, audits and distribution			New	April 2005 Nov. 2003
7799.3	Pooled trusts for persons with disabilities			New	April 2005 Nov. 2003
		(a)	Scope	New	April 2005 Nov. 2003

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(b)	Organization of pooled trust	New	April 2005 Nov. 2003
		(c)	Pooled trust fund	New	April 2005 Nov. 2003
		(d)	Reporting	New	April 2005 Nov. 2003
		(e)	Coordination of services	New	April 2005 Nov. 2003
		(f)	Notice	New	April 2005 Nov. 2003
		(g)	Applicability	New	April 2005 Nov. 2003
		(h)	Definitions	New	April 2005 Nov. 2003

**Chapter 79
Charitable Instruments**

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 79	Charitable Instruments			New	June 2010
7901	Short title			New	June 2010
7902	Definitions			New	June 2010
7903	Deemed provisions of governing instrument			New	June 2010
		(a)	Effect of deemed provisions	New	June 2010
		(b)	Effect of contrary provisions	New	June 2010
		(c)	Applicability	New	June 2010
7904	Power to amend governing instrument			New	June 2010
7905	Court authority			New	June 2010
7906	Applicability			New	June 2010

**Chapter 81
Principal and Income**

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 81	Principal and Income			Repeal	June 2001
				New	June 2001
8101	Scope			New	June 2001

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
8102	Definitions			Amendment	April 2005 Nov. 2003
				New	June 2001
8103	Fiduciary duties; general principles			New	June 2001
		(a)	Allocation	New	June 2001
		(b)	Discretionary power	New	June 2001
8104	Trustee's power to adjust			New	June 2001
		(a)	Adjustment	New	June 2001
		(b)	Considerations	New	June 2001
		(c)	Prohibited adjustments	Amendment	April 2005
				New	June 2001
		(d)	Permissible adjustment when otherwise prohibited	New	June 2001
		(e)	Release of the power to adjust	New	June 2001
		(f)	Application	New	June 2001
8105	Power to convert to unitrust			New	June 2001
		(a)	Conversion	Amendment	April 2005 Nov. 2003
				New	June 2001
		(b)	Judicially approved conversion	Amendment	April 2005
				New	June 2001
		(c)	Consideration	New	June 2001
		(d)	Post conversion	Amendment	October 2007
				New	June 2001
		(e)	Discretion of trustee	Amendment	October 2007
				New	June 2001
		(f)	Allocation	Amendment	April 2005
				New	June 2001
		(g)	Court orders	New	June 2001
		(g.1)	Reconversion from unitrust	New	April 2005
		(h)	Application	New	June 2001
		(i)	Prohibited conversions	Amendment	April 2005
				New	June 2001
		(j)	Permissible conversion when otherwise prohibited	New	June 2001
		(k)	Release of the power to convert	New	June 2001

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
8106	Judicial control of discretionary powers			New	June 2001
		(a)	Standard of review	New	June 2001
		(b)	Remedies	New	June 2001
8107	Express unitrusts			New	April 2005
		(a)	General rule	New	April 2005
		(b)	Definition	New	April 2005
	(Reserved)			New	June 2001
8108	(Reserved)			New	June 2001
8109	(Reserved)			New	June 2001
	Disposition of natural resources			Amendment	June 1977
8110	(Reserved)			New	June 2001
8111	(Reserved)			New	June 2001
	Expenses; trust estates				
		(d)	(no subsection heading)	Amendment	Nov. 1975
8112	(Reserved)			New	June 2001
8113	Charitable trusts			New	June 2001 March 1998
		(a)	Election	New	June 2001 March 1998
		(b)	Eligibility for election	New	June 2001 March 1998
		(c)	Effect of election	Amendment	April 2005
				New	June 2001 March 1998
		(d)	Revocation of election	New	June 2001 March 1998
		(e)	Value determination	New	June 2001 March 1998
		(f)	Charitable organizations	Conforming amendment	June 2010
				New	April 2005
8121	Determination and distribution of net income			Conforming amendment	April 2005 Nov. 2003
				New	June 2001
8122	Distribution to residuary and remainder beneficiaries			New	June 2001
		(a)	Distribution of net income	New	June 2001
		(b)	Allocation of net income	New	June 2001

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(c)	Collected but undistributed net income	New	June 2001
		(d)	Application	New	June 2001
		(e)	Distribution date	New	June 2001
8131	When right to income begins and ends			New	June 2001
		(a)	Accrual of income interest	New	June 2001
		(b)	Asset subject to a trust	New	June 2001
		(c)	Asset subject to a successive income interest	New	June 2001
		(d)	End of income interest	New	June 2001
8132	Apportionment of receipts and disbursements when decedent dies or income interest begins			New	June 2001
		(a)	Allocation to principal	New	June 2001
		(b)	Allocation to income	New	June 2001
		(c)	Due dates	New	June 2001
8133	Apportionment when income interest ends			New	June 2001
		(a)	End of mandatory income interest	New	June 2001
		(b)	Proration of final payment	New	June 2001
		(c)	Definition	New	June 2001
8141	Character of receipts			New	June 2001
		(a)	Allocation to income	New	June 2001
		(b)	Allocation to principal	New	June 2001
		(c)	When received in partial liquidation	Amendment	April 2005
				New	June 2001
		(d)	When not received in partial liquidation	Amendment	April 2005
				New	June 2001
		(e)	Reliance upon a statement	New	June 2001
		(f)	Definition	New	June 2001

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
8142	Distribution from trust or estate			New	June 2001
8143	Business and other activities conducted by trustee			New	June 2001
		(a)	Separate accounting for business or activity	New	June 2001
		(b)	Net receipts	New	June 2001
		(c)	Permissible activities for separate accounting	New	June 2001
8144	Principal receipts			New	June 2001
8145	Rental property			New	June 2001
		(a)	Rent	New	June 2001
		(b)	Deposit	New	June 2001
8146	Obligation to pay money			New	June 2001
		(a)	Interest allocated to income	New	June 2001
		(b)	Allocation of obligations	New	June 2001
		(c)	Application	New	June 2001
8147	Insurance policies and similar contracts			New	June 2001
		(a)	General rule	New	June 2001
		(b)	Allocation of proceeds to income	New	June 2001
		(c)	Application	New	June 2001
8148	Insubstantial allocations not required			New	June 2001
8149	Retirement benefits, individual retirement accounts, deferred compensation, annuities and similar payments			New	June 2001
		(a)	General rule	New	June 2001
		(b)	Allocation under contract calling for equal installments	New	June 2001
		(c)	Allocation when internal net income of fund is readily ascertained	Amendment	October 2007
				New	June 2001
		(d)	When not otherwise allocable to income	New	June 2001

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(e)	Allocation to obtain marital deduction	New	June 2001
		(f)	Application	New	June 2001
		(g)	Definition	New	June 2001
8150	Liquidating asset			New	June 2001
		(a)	Allocation	New	June 2001
		(b)	Definition	New	June 2001
8151	Minerals, water and other natural resources			New	June 2001
		(a)	Allocation for receipts from minerals and other natural resources	New	June 2001
		(b)	Allocation for receipts from water	New	June 2001
		(c)	Application	New	June 2001
8152	Timber			New	June 2001
		(a)	Allocation of net receipts	New	June 2001
		(b)	Determining net receipts	New	June 2001
		(c)	Application	New	June 2001
8153	Property not productive of income			New	June 2001
		(a)	General rule	New	June 2001
		(b)	Other cases	New	June 2001
8154	Derivatives and options			New	June 2001
		(a)	Derivatives	New	June 2001
		(b)	Options	New	June 2001
		(c)	Definition	New	June 2001
8155	Asset-backed securities			New	June 2001
		(a)	General rule	New	June 2001
		(b)	Allocation where liquidating trust's interest in security	New	June 2001
		(c)	Definition	New	June 2001
8161	Mandatory disbursements from income			New	June 2001
8162	Mandatory disbursements from principal			New	June 2001
		(a)	Mandatory disbursements	New	June 2001
		(b)	Mandatory reimbursement	New	June 2001

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
8163	Discretionary allocation of disbursements			New	June 2001
8164	Transfers from income to principal for depreciation			New	June 2001
		(a)	Transfers	New	June 2001
		(b)	Separate fund unnecessary for amount transferred	New	June 2001
		(c)	Definition	New	June 2001
8165	Transfers from income to reimburse principal			New	June 2001
		(a)	Permissible reimbursements	New	June 2001
		(b)	Continued transfers	New	June 2001
		(c)	Application	New	June 2001
8166	Income taxes			New	June 2001
		(a)	Receipts allocated to income	New	June 2001
		(b)	Receipts allocated to principal	New	June 2001
		(c)	Tax on entity's taxable income	New	June 2001
		(d)	Reductions in receipts allocated to principal or income	New	June 2001
8167	Adjustments between principal and income because of taxes			New	June 2001
8191	Uniformity of application and construction			New	June 2001

Chapter 82
Revised Price Act

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 82	Revised Price Act			Repeal	May 1973

**Chapter 83
Inalienable Property**

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 83	Inalienable Property			New	May 1973
8301	Powers of court to authorize sale, etc. of real property			Amendment	June 1991
				New	May 1973
8302	Venue where real property is wholly in one county			New	May 1973
8303	Venue where real property is in more than one county			New	May 1973
8304	Procedure			New	May 1973
8305	Sale of real property subject to future inalienable interests; disposition of proceeds			New	May 1973
8306	Title of purchaser			New	May 1973

**Chapter 84
Military Service**

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 84 Subch. A	Fiduciaries in Military Service			Repeal	May 1973

**Chapter 86
Anatomical Gifts**

20 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
8604	Manner of executing anatomical gifts				
		(d)		Amendment	May 1973
8611	Persons who may execute anatomical gift				
		(a)	General rule	Conforming amendment	Nov. 1998

**Title 15 of the Pennsylvania Consolidated Statutes (15 Pa.C.S.)
(Associations Code)**

15 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5547	Authority to take and hold trust property				
		(b)	Nondiversion of certain property	Conforming amendment	October 2007
5548	Investment of trust funds				
		(a)	General rule	Amendment	March 1998
		(b)	Use and management	Conforming amendment	October 2007
				Amendment	March 1998
		(c)	Determination of income	Amendment	March 1998
		(e)	Definition	Repeal	March 1998
5549	Transfer of trust or other assets to institutional trustee				
		(c)	Amount and frequency of payment	Amendment	March 1998
5585	Establishment or use of common trust funds authorized				
		(a)	General rule	Amendment	March 1998

**Title 18 of the Pennsylvania Consolidated Statutes (18 Pa.C.S.)
(Crimes Code)**

18 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
2713	Neglect of care-dependent person				
		(e)	Treatment in conformance with care-dependent person's right to accept or refuse services	Amendment	February 2002

**Title 23 of the Pennsylvania Consolidated Statutes (23 Pa.C.S.)
(Domestic Relations Code)**

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Part III	Adoption			New	May 1980
Chapter 21	Preliminary Provisions			New	May 1980
2101	Short title of part			New	May 1980
2102	Definitions			New	May 1980
Chapter 23	Jurisdiction and Parties			New	May 1980
2301	Court			New	May 1980
2302	Venue			New	May 1980
2311	Who may be adopted			New	May 1980
2312	Who may adopt			New	May 1980
2313	Representation of child			New	May 1980
Chapter 25	Proceedings Prior to Petition to Adopt			New	May 1980
2501	Relinquishment to agency			New	May 1980
		(a)	Petition	New	May 1980
		(b)	Consents	New	May 1980
2502	Relinquishment to adult intending to adopt child			New	May 1980
		(a)	Petition	New	May 1980
		(b)	Consents	New	May 1980
2503	Hearing			New	May 1980
		(a)	General rule	New	May 1980
		(b)	Notice	New	May 1980
		(c)	Decree	New	May 1980
2511	Grounds for involuntary termination			New	May 1980
		(a)	General rule	New	May 1980
		(b)	Other considerations	New	May 1980
2512	Petition for involuntary termination			New	May 1980
		(a)	Who may file	New	May 1980
		(b)	Contents	New	May 1980
		(c)	Father not identified	New	May 1980
2513	Hearing			New	May 1980
		(a)	Time	New	May 1980
		(b)	Notice	New	May 1980
		(c)	Mother competent witness on paternity issue	New	May 1980
		(d)	Decree	New	May 1980
2521	Effect of decree of termination			New	May 1980

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(a)	Adoption proceeding rights extinguished	New	May 1980
		(b)	Award of custody	New	May 1980
		(c)	Authority of agency or person receiving custody	New	May 1980
2531	Report of intention to adopt			New	May 1980
		(a)	General rule	New	May 1980
		(b)	Contents	New	May 1980
		(c)	When report not required	New	May 1980
2532	Filing of report			New	May 1980
2533	Report of intermediary			New	May 1980
		(a)	General rule	New	May 1980
		(b)	Contents	New	May 1980
2534	Exhibits			New	May 1980
2535	Investigation			New	May 1980
		(a)	General rule	New	May 1980
		(b)	Matters covered	New	May 1980
		(c)	Payment of costs	New	May 1980
Chapter 27	Petition for Adoption			New	May 1980
2701	Contents of petition for adoption			New	May 1980
2702	Exhibits			New	May 1980
2711	Consents necessary to adoption			New	May 1980
		(a)	General rule	New	May 1980
		(b)	Husband of natural mother	New	May 1980
2712	Consents not naming adopting parents			New	May 1980
2713	When other consents not required			New	May 1980
2714	When consent of parent not required			New	May 1980
2721	Notice of hearing			New	May 1980
2722	Place of hearing			New	May 1980
2723	Attendance at hearing			New	May 1980
2724	Testimony and investigation			New	May 1980
		(a)	Testimony	New	May 1980
		(b)	Investigation	New	May 1980
		(c)	Payment of investigation costs	New	May 1980
2725	Religious belief			New	May 1980

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 29	Decrees and Records			New	May 1980
2901	Time of entry of decree of adoption			New	May 1980
2902	Requirements and form of decree of adoption			New	May 1980
		(a)	General rule	New	May 1980
		(b)	Withdrawal or dismissal of petition	New	May 1980
2903	Retention of parental status			New	May 1980
2904	Name of adoptee			New	May 1980
2905	Impounding of proceedings			New	May 1980
2906	Docket entries			New	May 1980
2907	Certificate of adoption			New	May 1980
2908	Foreign decree of adoption			New	May 1980
Chapter 59	Assisted Reproductive Technologies			New	May 2008 May 2007 (A.R.T.)
5901	Short title of chapter			New	May 2008 May 2007 (A.R.T.)
5902	Definitions			New	May 2008 May 2007 (A.R.T.)
5903	Donors			New	May 2008 May 2007 (A.R.T.)
		(a)	General rule	New	May 2008 May 2007 (A.R.T.)
		(b)	Donor with intent to become parent	New	May 2008 May 2007 (A.R.T.)
5904	Determination of legal parentage generally			New	May 2008 May 2007 (A.R.T.)
		(a)	Exclusivity	New	May 2008 May 2007 (A.R.T.)
		(b)	Court jurisdiction	New	May 2008 May 2007 (A.R.T.)
5905	Gestational agreements generally			New	May 2008 May 2007 (A.R.T.)

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(a)	Parties to agreement	New	May 2008 May 2007 (A.R.T.)
		(b)	Writing required	New	May 2008 May 2007 (A.R.T.)
		(c)	Permissible provisions in agreement	New	May 2008 May 2007 (A.R.T.)
		(d)	Health decision making by gestational carrier	New	May 2008 May 2007 (A.R.T.)
		(e)	Enforcement of gestational agreement	New	May 2008 May 2007 (A.R.T.)
		(f)	Genetic testing	New	May 2008 May 2007 (A.R.T.)
		(g)	Fraud and duress	New	May 2008 May 2007 (A.R.T.)
5906	Records generally			New	May 2007 (A.R.T.)
		(a)	Retention and confidentiality	New	May 2007 (A.R.T.)
		(b)	Penalty for unauthorized disclosure	New	May 2007 (A.R.T.)
5911	Applicability			New	May 2008 May 2007 (A.R.T.)
5912	Venue			New	May 2008 May 2007 (A.R.T.)
5913	Execution of gestational agreement			New	May 2008 May 2007 (A.R.T.)
		(a)	Timing	New	May 2008 May 2007 (A.R.T.)
		(b)	Notarization	New	May 2008 May 2007 (A.R.T.)
5914	Mandatory contents of gestational agreement				May 2008 May 2007 (A.R.T.)

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5915	Terminating gestational agreement and vacating decree			New	May 2008 May 2007 (A.R.T.)
		(a)	Circumstances under which termination of agreement permitted	New	May 2008 May 2007 (A.R.T.)
		(b)	Notice if decree not issued	New	May 2008 May 2007 (A.R.T.)
		(c)	Notice if decree issued	New	May 2008 May 2007 (A.R.T.)
		(d)	Liability	New	May 2008 May 2007 (A.R.T.)
5916	Establishing legal parentage through validation of gestational agreement			New	May 2008 May 2007 (A.R.T.)
		(a)	Applicability	New	May 2008 May 2007 (A.R.T.)
		(b)	General rules	New	May 2008 May 2007 (A.R.T.)
		(c)	Contents of petition	New	May 2008 May 2007 (A.R.T.)
		(d)	Hearing to consider petition; notice	New	May 2008 May 2007 (A.R.T.)
		(e)	Validation decree	New	May 2008 May 2007 (A.R.T.)
		(f)	Postbirth notice	New	May 2008 May 2007 (A.R.T.)
		(g)	Postbirth decree	New	May 2008 May 2007 (A.R.T.)
5921	Applicability			New	May 2008 May 2007 (A.R.T.)
5922	Venue			New	May 2008 May 2007 (A.R.T.)

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5923	Execution of gestational agreement			New	May 2008 May 2007 (A.R.T.)
		(a)	Timing	New	May 2008 May 2007 (A.R.T.)
		(b)	Intent	New	May 2008 May 2007 (A.R.T.)
5924	Petition to ratify agreement			New	May 2008 May 2007 (A.R.T.)
		(a)	General rule	New	May 2008 May 2007 (A.R.T.)
		(b)	Contents of petition	New	May 2008 May 2007 (A.R.T.)
		(c)	Exhibits	New	May 2008 May 2007 (A.R.T.)
		(d)	Instruments	New	May 2008 May 2007 (A.R.T.)
5925	Hearing and notice			New	May 2008 May 2007 (A.R.T.)
		(a)	Scheduling	New	May 2008 May 2007 (A.R.T.)
		(b)	Notice	New	May 2008 May 2007 (A.R.T.)
		(c)	Procedures	New	May 2008 May 2007 (A.R.T.)
5926	Decree			New	May 2008 May 2007 (A.R.T.)
5927	Amended petition unnecessary			New	May 2008 May 2007 (A.R.T.)
5931	Applicability			New	May 2008
5932	Legal parentage			New	May 2008
		(a)	Legal parentage of man	New	May 2008
		(b)	Legal parentage of woman	New	May 2008

23 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
5933	Consent to assisted reproduction			New	May 2008
		(a)	General rule	New	May 2008
		(b)	Who must consent	New	May 2008
		(c)	Contents of consent	New	May 2008
		(d)	Copy of consent	New	May 2008
		(e)	Failure to sign consent	New	May 2008
		(f)	Withdrawal of consent	New	May 2008
5934	Effect of filing complaint for divorce or annulment			New	May 2008
		(a)	General rule	New	May 2008
		(b)	Effect of withdrawal of complaint or reconciliation	New	May 2008
5935	Parental status of deceased individual			New	May 2008
		(a)	Consent necessary	New	May 2008
		(b)	Notice and placement requirements	New	May 2008
5941	Records generally			New	May 2008
		(a)	Retention and confidentiality	New	May 2008
		(b)	Penalty for unauthorized disclosure	New	May 2008
5942	Release of information from court records			New	May 2008
Part IX	Miscellaneous Provisions			New	May 1980
Chapter 83	Legitimacy of Children			New	May 1980
8302	Acknowledgment of paternity			New	May 1980
8303	Claim of paternity			New	May 1980

**Title 72 of the Pennsylvania Consolidated Statutes (72 Pa.C.S.)
(Taxation and Fiscal Affairs)²³⁹**

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
Chapter 17	Inheritance and Estate Taxes			New	March 1981
1701	Short title of chapter			New	March 1981
1702	Definitions			Amendment	June 1991 February 1988
				New	March 1981
1703	Powers of department			New	March 1981
		(a)	Rules and regulations	New	March 1981
		(b)	Appraisements, allowance of deductions and assessment of tax	New	March 1981
		(c)	Exercising powers vested in register	New	March 1981
1706	Imposition of tax			New	March 1981
1707	Transfers subject to tax			New	March 1981
		(a)	General rule	New	March 1981
		(b)	Transfers by will or intestacy	New	March 1981
		(c)	Inter vivos transfers	Amendment	June 1991 February 1988
				New	March 1981
		(d)	Trusts and similar arrangements for spouses	New	June 1991
1708	Joint tenancy			New	March 1981
		(a)	General rule	New	March 1981
		(b)	Husband and wife	Amendment	June 1991 February 1988
				New	March 1981
		(c)	Other exception	New	March 1981
1709	Employment benefits			New	February 1988
		(a)	Retirement benefits	New	February 1988
		(b)	Other employment benefits	New	February 1988
1711	Transfers not subject to tax			New	March 1981
		(a)	General rule	New	March 1981
		(b)	Governments	New	March 1981

²³⁹ See note 33.

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(c)	Charitable and fraternal organizations	New	March 1981
		(d)	Life insurance	New	March 1981
		(e)	War risk insurance	New	March 1981
		(f)	Proceeds obtained by estates of Vietnam conflict veterans	New	March 1981
		(g)	Inter vivos transfers to exempt donee	New	March 1981
		(h)	Intangibles of nonresident	New	March 1981
		(i)	Advancements	New	March 1981
		(j)	Adjusted service certificates and bonds	New	March 1981
		(k)	Property subject to power of appointment	Amendment	June 1991
				New	March 1981
		(l)	Commonwealth as statutory heir	New	March 1981
		(m)	Husband and wife	Amendment	June 1991 February 1988
				New	March 1981
		(n)	Nominal ownership	New	March 1981
		(o)	Obligations worthless at death	New	March 1981
		(p)	Social Security death payment	Amendment	June 1991 February 1988
				New	March 1981
		(q)	Railroad retirement burial benefit	New	March 1981
		(r)	Employment benefits	Repeal	February 1988
				New	March 1981
1712	Trusts and similar arrangements for spouses			New	June 1991
1716	Inheritance tax			New	March 1981
		(a)	Rate of tax	Amendment	June 1991 February 1988
				New	March 1981
		(b)	Computation of tax	New	March 1981
		(c)	Renunciation of transfer	New	March 1981

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(d)	Compromise of rights	New	March 1981
		(e)	Compromise as to rate of future interests	Amendment	June 1991
				New	March 1981
		(f)	Powers of appointment	New	March 1981
1717	Estate tax			New	March 1981
		(a)	Residents	Amendment	June 1991 February 1988
				New	March 1981
		(b)	Nonresidents of United States	Amendment	June 1991
				Repeal	February 1988
				New	March 1981
			Excluded death taxes	New	February 1988
		(c)	Credit for additional inheritance tax after payment of estate tax	Amendment	February 1988
				New	March 1981
1718	Generation-skipping transfer tax			New	June 1991
		(a)	Residents	New	June 1991
		(b)	Nonresidents	New	June 1991
		(c)	Definition	New	June 1991
1721	Valuation			New	March 1981
		(a)	General rule	New	March 1981
		(b)	Valuation of life interest	New	March 1981
		(c)	Valuation of interest for term credit	New	March 1981
		(d)	Annuity or life estate terminated within nine months of decedent's death	New	March 1981
		(e)	Valuation of future interest	New	March 1981
		(f)	Valuation of property subject to option or agreement	New	March 1981
1722	Valuation of certain farmland			New	March 1981
		(a)	Definitions	New	March 1981
		(b)	General rule	New	March 1981

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(c)	Imposition of tax when use abandoned	New	March 1981
		(d)	Separation, split-off or transfer	New	March 1981
1726	Deductions generally			New	March 1981
1727	Expenses			New	March 1981
1728	Taxes			New	March 1981
1729	Liabilities			New	March 1981
		(a)	General rule	New	March 1981
		(b)	Debt based upon contract or agreement	New	March 1981
		(c)	Secured loan	New	March 1981
		(d)	Joint obligation	New	March 1981
		(e)	Support contract	New	March 1981
		(f)	Legacy in discharge of decedent's obligation	New	March 1981
		(g)	Outlawed debt	New	March 1981
		(h)	Pledge to exempt transferee	New	March 1981
		(i)	Liability for tort or as accommodation party	New	March 1981
		(j)	Married person's obligations	New	March 1981
		(k)	Medical expenses	New	March 1981
1730	Deductions not allowed			Amendment	June 1991 February 1988
				New	March 1981
1736	Returns			New	March 1981
		(a)	Persons responsible for returns	New	March 1981
		(b)	Inclusion of property	New	March 1981
		(c)	Supplemental returns	New	March 1981
		(d)	Time for filing return	New	March 1981
		(e)	Form of returns	New	March 1981
		(f)	Place for filing returns	New	March 1981
1737	Appraisement			New	March 1981
1738	Deductions			New	March 1981
1739	Assessment of tax			New	March 1981
1740	Notice			New	March 1981

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
1741	Failure to file returns not a bar to assessment of tax			New	March 1981
1742	Payment date and discount			New	March 1981
1743	Interest			New	March 1981
1744	Source of payment			New	March 1981
		(a)	Outright devisees and bequests	New	March 1981
		(b)	Outright preresiduary gifts	New	March 1981
		(c)	In trust preresiduary gifts passing by will	New	March 1981
		(d)	In trust preresiduary gift passing by inter vivos trusts	New	March 1981
		(e)	Transfer for limited period	New	March 1981
		(e.1)	Trusts for spouses	New	June 1991
		(f)	Other transfers	New	March 1981
1745	Estate tax			New	March 1981
		(a)	Persons liable	New	March 1981
		(b)	Filing of return	New	March 1981
		(c)	Payment date	New	March 1981
		(d)	Discount	New	March 1981
		(e)	Interest	New	March 1981
		(f)	Source of payment	New	March 1981
		(g)	Place of payment	New	March 1981
1746	Deduction and collection of tax by personal representative or other fiduciary			New	March 1981
1747	Duties of depositories			New	March 1981
1748	Compromise by department			New	March 1981
1749	Interstate compromise and arbitration of inheritance taxes			New	March 1981
1750	Extension of time for payment			New	March 1981
1751	Bond for delinquent tax			New	March 1981
1752	Evidence of payment of tax for real estate in another county			New	March 1981
1753	Penalties			New	March 1981
		(a)	Failure to file tax returns	Amendment	June 1991

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
				New	March 1981
		(b)	Failure to give notice of death of depositor	New	March 1981
		(c)	False returns	New	March 1981
1755	Payment of generation-skipping transfer tax			New	June 1991
		(a)	Person liable	New	June 1991
		(b)	Filing of return	New	June 1991
		(c)	Payment due	New	June 1991
		(d)	Discount	New	June 1991
		(e)	Interest	New	June 1991
		(f)	Source of payment	New	June 1991
		(g)	Place of payment	New	June 1991
		(h)	Compromise with other states	New	June 1991
1756	Short title of subchapter			New	March 1981
1757	Compromise agreement and filing, interest or penalty for nonpayment of taxes			New	March 1981
1758	Arbitration agreement			New	March 1981
1759	Arbitration board			New	March 1981
		(a)	Powers of board	New	March 1981
		(b)	Hearings	New	March 1981
		(c)	Majority vote	New	March 1981
		(d)	Determination of domicile	New	March 1981
		(e)	Compensation and expenses	New	March 1981
1760	Filing and determination of domicile and other documents			New	March 1981
1761	Interest or penalties for nonpayment of taxes			New	March 1981
1762	Compromise by parties to arbitration agreement			New	March 1981
1763	Reciprocal application			New	March 1981
1766	Timely mailing treated as timely filing and payment			New	March 1981
1767	Lien and duration of lien			New	March 1981
1768	Limited and future interests			New	March 1981

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
1769	Purchaser, mortgagee or lessee			New	March 1981
1770	Sale by fiduciary			New	March 1981
1771	Sale by heir, devisee or fiduciary			New	March 1981
1772	Sale of property transferred inter vivos			New	March 1981
1773	Subordination of lien			New	March 1981
1774	Cessation upon approval of board			New	March 1981
1775	Release of lien			New	March 1981
		(a)	No tax due	New	March 1981
		(b)	Other security	New	March 1981
		(c)	Partial payment	New	March 1981
		(d)	Department's certificate conclusive evidence of release	New	March 1981
1776	Enforcement procedure			New	March 1981
		(a)	Citation	New	March 1981
		(b)	Decrees	New	March 1981
		(c)	When citation issuable	New	March 1981
		(d)	Subpoenas	New	March 1981
		(e)	Property subject to execution	New	March 1981
		(f)	Reciprocity with other states	New	March 1981
1781	Refund of tax			New	March 1981
		(a)	When refunds will be made	New	March 1981
		(b)	Interest	New	March 1981
		(c)	Form of refund	New	March 1981
		(d)	Time for claiming refund	New	March 1981
		(e)	To whom application for refund shall be made	Amendment	June 1991 February 1988
				New	March 1981
		(f)	Judicial review of board action	Amendment	June 1991 February 1988
				New	March 1981
		(g)	Appropriation	New	March 1981
1786	Protest, notice and appeal			New	March 1981
		(a)	General rule	New	March 1981
		(b)	Future interests	New	March 1981

72 Pa.C.S. Section	Section Heading	Subsection	Subsection Heading	Recommendation	Report
		(c)	Farmland	New	March 1981
1787	Bond			New	March 1981
1788	Appeal and removal from department			New	March 1981
		(a)	General rule	New	March 1981
		(b)	Future interests	New	March 1981
1791	Entry prohibited			New	March 1981
1792	Entry without notice to department			New	March 1981
		(a)	Entry with bank employee	Amendment	June 1991
				New	March 1981
		(b)	Entry with representative of department	New	March 1981
		(c)	Entry under court order	New	March 1981
		(d)	Entry into box used by business firm	New	March 1981
		(e)	Entry into box to remove will and cemetery deed	New	March 1981
1793	Entry upon notice to department			New	March 1981
		(a)	General rule	New	March 1981
		(b)	Notice to department	New	March 1981
		(c)	Exoneration of financial institution	New	March 1981
1794	Subsequent entries			New	March 1981
1795	Confidential nature of contents			New	March 1981
1796	Penalties			March 1981	March 1981
		(a)	Bank employees	Amendment	June 1991
				New	March 1981
		(b)	Other persons	New	March 1981
		(c)	Disclosure of confidential information	New	March 1981

Unconsolidated Statutes²⁴⁰

Date of Act	P.L.	No.	Name/Subject	Recommendation	Report
April 7, 1826	227	72	(collateral inheritances)	Repeal	March 1981
May 11, 1901	173	139	(inheritance tax)	Repeal	March 1981
June 20, 1919	521	258	(transfer of property)	Repeal of § 12	March 1981
May 31, 1923	468	256	Uniform Fiduciaries Act	Repeal	October 1985
May 4, 1927	727	375	(transfer of property)	Repeal	March 1981
April 9, 1929	343	176	The Fiscal Code	Repeal of Article XIII.1 ²⁴¹	October 1983
May 8, 1929	1673	531	(refunds)	Repeal	March 1981
July 9, 1935	612	214	(adoption)	Repeal	May 1980
July 30, 1947	1180	491	(adoption)	Repeal of § 4	May 1980
May 23, 1949	1726	528	Uniform Act on Interstate Compromise and Arbitration of Inheritance Taxes	Repeal	March 1981
April 12, 1951	90	21	Liquor Code	Amendment of § 491(1)	March 1981
August 26, 1953	1411	400	(adoption)	Repeal of § 6	May 1980
June 15, 1961	373	207	Inheritance and Estate Tax Act of 1961	Repeal	March 1981
November 30, 1965	847	356	Banking Code of 1965	Amendment of § 404(a)	October 1983
October 20, 1966 ²⁴²	96	6	Mental Health and Mental Retardation Act of 1966	Amendment of § 102; addition of § 306	Sept. 1974
July 24, 1970	620	208	Adoption Act	Repeal	May 1980
June 17, 1971	181	23	Charitable Instruments Act of 1971	Repeal	June 2010
				Amendment	April 1994
April 2, 1980	63	26	Divorce Code ²⁴³	Amendment of §§ 401(b) & 403(d)	February 1988
December 9, 2002	1379	168	Pooled Trust Act	Repeal	April 2005 Nov. 2003

²⁴⁰ The 86 unconsolidated acts proposed for repeal by the Advisory Committee in the May 1973 report appear *supra* pp. 120-122.

²⁴¹ Insofar as it is inconsistent with the amendment of 20 Pa.C.S. § 3540.

²⁴² 3rd Sp. Sess.

²⁴³ The act of April 2, 1980 (P.L.63, No.26), known as the Divorce Code was repealed by the act of December 19, 1990 (P.L.1240, No.206). Act No. 206 of 1990 codified, among other things, provisions regarding divorce under Title 23 of the Pennsylvania Consolidated Statutes (23 Pa.C.S.).

PROPOSED LEGISLATION ORGANIZED BY LEGISLATIVE SESSION

The following table summarizes the legislation that was based on the recommendations of the Advisory Committee and introduced during the various legislative sessions of the Pennsylvania General Assembly, from 1972 until 2013.²⁴⁴ The language of an enacted amendment, repeal or addition of a statutory provision is not necessarily the same as that recommended by the Advisory Committee; in a number of instances, the proposed legislation was changed during the legislative process.

Not included in this table are certain bills in which select members of the Advisory Committee were formally consulted for input during the legislative process but which were not specifically endorsed by the Advisory Committee at one of its annual meetings. Most recently, these bills have included the following:

- 2013 House Bill No. 749 (Pennsylvania Uniform Transfers to Minors Act; pooled trusts for persons with disabilities)
- 2013 Senate Bill No. 428 (pooled trusts for persons with disabilities)
- 2013 Senate Bill No. 620 (powers of attorney)
- 2011 House Bill No. 1720 (Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act), which became 2012 Act No. 108
- 2011 House Bill No. 1905 (powers of attorney)
- 2011 House Bill No. 2285 (Pennsylvania Uniform Transfers to Minors Act; pooled trusts for persons with disabilities)
- 2011 Senate Bill No. 523 (payments to family and funeral directors)
- 2011 Senate Bill No. 862 (pooled trusts for persons with disabilities)
- 2009 Senate Bill No. 266 (payments to family and funeral directors)

²⁴⁴ The table does not comprehensively list all the legislation introduced or enacted regarding the Probate, Estates and Fiduciaries Code. HB indicates a House bill, and SB indicates a Senate bill.

A provision marked with an asterisk (*) in the following table was not enacted with the other provisions of the bill.

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
2013-14	HB 513	556 2169	20 Pa.C.S. §§ 3101, 3102, 3531	2013 Act No. 35 Act of July 2, 2013
	SB 117	73	20 Pa.C.S. §§ 751, 752, 5503, 5504, 5511, 5512, 5512.2, 5512.4, 5512.5, 5513, 5515, 5515.1, 5515.2, 5515.3, 5518, 5518.1, 5521, 5526, 5531, 5536, 5553	
	SB 621	597	20 Pa.C.S. §§ 2514, 3163, 3314, 3315, 3546, 6103, 6103.1, 7601-7607 (Chapter 76), 7710.1, 7722, 7740.7, 7765, 7780.3, 7792, 7901-7906 (Chapter 79), 8113 Act of June 17, 1971 (P.L.181, No.23), known as the Charitable Instruments Act of 1971	
2011-12	HB 1324	1503 2470	20 Pa.C.S. §§ 3102, 3531, 5101	
	SB 96	81	20 Pa.C.S. §§ 2514, 3163, 3314, 3315, 3546, 5422, 5456, 5460, 5601, 5601.2, 5602, 5603, 5604, 5610, 5612, 5613, 5614, 6103, 6103.1, 7601-7607 (Chapter 76), 7710.1, 7722, 7740.7, 7765, 7780.3, 7792, 7901-7906 (Chapter 79), 8113 Act of June 17, 1971 (P.L.181, No.23), known as the Charitable Instruments Act of 1971	
	SB 1092	1270 2416	20 Pa.C.S. §§ 5601, 5602, 5608	
	SB 1614	2471	20 Pa.C.S. §§ 751, 752, 5503, 5504, 5511, 5512, 5512.2, 5512.4, 5512.5, 5513, 5515, 5515.1, 5515.2, 5515.3, 5518, 5518.1, 5521, 5526, 5531, 5536, 5553	
2009-10	HB 1478	1840	20 Pa.C.S. §§ 3102, 3531, 5101	

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
	SB 53	38 190 195 1663 2140 2228	15 Pa.C.S. §§ 5547, 5548 20 Pa.C.S. §§ 2106, 2507, 2801-2803 (Chapter 28), 3101*, 3162, 3301, 3706, 5603, 6107.1, 6111.1, 6111.2, 7725, 7745, 7754, 7755, 7766, 7780.3, 7780.6, 7785, 8105, 8149	2010 Act No. 85 Act of October 27, 2010 (P.L.837, No.85)
	SB 1358	1970	20 Pa.C.S. §§ 5422, 5456, 5460, 5601, 5601.2, 5602, 5603, 5604, 5610, 5612, 5613, 5614	
2007-08	SB 1203	1633 2048 2293	15 Pa.C.S. §§ 5547, 5548 20 Pa.C.S. §§ 2106, 2507, 3162, 3301, 3706, 5603, 6107.1, 6111.1, 6111.2, 7725, 7745, 7754, 7755, 7780.3, 7780.6, 7785, 8105, 8149	
2005-06	SB 628	693 1943 2117	18 Pa.C.S. § 2713 20 Pa.C.S. §§ 711, 5401-5416 (Chapter 54), 5421-5488 (Chapter 54), 54A01-54A13 (Chapter 54A) § 6 of the act of June 19, 2002 (P.L.409, No.59) *	2006 Act No. 169 Act of November 29, 2006 (P.L.1484, No.169)
	SB 660	754 1423 1969	20 Pa.C.S. §§ 723, 724, 725, 751, 908, 3384.1, 3534.1, 3543, 3702, 6101, 6102, 6104, 6106, 6107, 6107.1, 6110, 6112, 6114, 7101-7192 (Chapter 71), 7201, 7314.1, 7503, 7504, 7506, 7701-7799.3 (Chapter 77), 8102, 8104, 8105, 8107, 8113, 8121, 8141 Act of December 9, 2002 (P.L.1379, No.168), known as the Pooled Trust Act	2006 Act No. 98 Act of July 7, 2006 (P.L.625, No.98)
2003-04	HB 786	918 2708	20 Pa.C.S. § 5601	2003 Act No. 36 Act of November 25, 2003 (P.L.211, No. 36)

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
	HB 2036	2739 4166 4270 4383 4723 4779	20 Pa.C.S. §§ 5801-5845 (Chapter 58), ²⁴⁵ 7203 § 4 of the act of November 6, 2002 (P.L.1101, No.133)	2004 Act No. 194 Act of November 30, 2004 (P.L.1525, No.194)
	SB 316	331	20 Pa.C.S. §§ 711, 5511, 5512.1, 5513, 5518, 5518.1, 5521, 5522, 5531	
	SB 492	529 1653	18 Pa.C.S. § 2713 20 Pa.C.S. §§ 711, 5401-5416 (Chapter 54), 5421-5488 (Chapter 54), 54A01-54A13 (Chapter 54A), 5602, 5603 § 6 of the act of June 19, 2002 (P.L.409, No.59)	Final Passage in the Senate: November 9, 2004 Final Passage in the House: November 19, 2004 Vetoed by the Governor: November 30, 2004 (Veto No. 8)
	SB 978	1329 1502	20 Pa.C.S. §§ 751, 908, 3384.1, 3534.1, 3543, 6102, 6110, 6112, 6114, 7101-7192 (Chapter 71), 7503, 7504, 7506, 7701-7799.3 (Chapter 77), 8102, 8105, 8121 Act of December 9, 2002 (P.L.1379, No.168), known as the Pooled Trust Act	
2001-02	HB 96	81 1073 1483 2022 3930	20 Pa.C.S. §§ 3121*, 5403, 5413, 5401-A through 5413-A (Chapter 54-A)	2002 Act No. 59 Act of June 19, 2002 (P.L.409, No.59)
	HB 2060	2723 4466	20 Pa.C.S. §§ 5703*, 5704*, 7203, 7204 § 6(B)(2) of the act of June 25, 1999 (P.L.212, No.28)	2002 Act No. 133 Act of November 6, 2002 (P.L.1101, No.133)
	SB 389	402	20 Pa.C.S. §§ 711, 5511, 5512.1, 5513, 5518, 5518.1, 5521, 5522, 5531	

²⁴⁵ Not recommended by the Advisory Committee.

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
	SB 1014	1261 1431	20 Pa.C.S. §§ 724, 2104, 3701, 3702, 5164, 5301, 5320, 5321, 5536, 5601, 5706, 6205, 7104, 7105, 8101-8112 (Chapter 81), 8101-8191 (Chapter 81)	2002 Act No. 50 Act of May 16, 2002 (P.L.330, No.50)
	SB 1265	1682 2226 2384	18 Pa.C.S. § 2713 20 Pa.C.S. §§ 711, 5401-5416 (Chapter 54), 5401-5445 (Chapter 54), 54A03, 54A04, 5602, 5603	
1999-2000	HB 96	75 1797 2028 2943	20 Pa.C.S. §§ 5403, 5407, 5410, 5411, 5413, 5415, 5401-A through 5413-A (Chapter 54-A)	
	HB 1475	1774	20 Pa.C.S. §§ 711, 712, 5511, 5512.1, 5513, 5518, 5518.1, 5521, 5522, 5531	
	SB 170	167	20 Pa.C.S. §§ 711, 5511, 5512.1, 5513, 5518, 5518.1, 5521, 5522, 5531	
	SB 172	178 1799 1933	18 Pa.C.S. § 2713 20 Pa.C.S. §§ 711, 5401-5437 (Chapter 54), 5602, 5603	
	SB 173	179	20 Pa.C.S. §§ 711, 712, 751, 2206, 2514, 3316.1, 3319, 3321, 3504, 5144, 5306, 5521, 5552, 5601, 5601.2, 5602, 5603, 5604, 5605, 5606, 5607, 5608, 5609, 5610, 5611, 6202, 7133, 7191, 8611	1999 Act No. 39 Act of October 12, 1999 (P.L.422, No.39)
	SB 174	168	15 Pa.C.S. § 5548 20 Pa.C.S. §§ 3316, 5145, 7134, 7201-7214 (Chapter 72), 7301	1999 Act No. 28 Act of June 25, 1999 (P.L.212, No.28)
1997-98	HB 2492	3358	20 Pa.C.S. §§ 711, 712, 5511, 5512.1, 5513, 5518, 5518.1, 5521, 5522, 5531	
	SB 560	588	20 Pa.C.S. §§ 5403, 5414.1, 5415	

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
	SB 1205	1501 1826 1946 2258 2285 2305	15 Pa.C.S. §§ 5548, 5549, 5585 20 Pa.C.S. §§ 7501-7506 (Chapter 75), ²⁴⁶ 8113, 8611*	1998 Act No. 141 Act of December 21, 1998 (P.L.1067, No.141)
	SB 1286	1650	20 Pa.C.S. §§ 711, 712, 5511, 5512.1, 5513, 5518, 5518.1, 5521, 5522, 5531	
	SB 1357	1761	20 Pa.C.S. §§ 5401-5437 (Chapter 54), 5602, 5603	
	SB 1358	1762	15 Pa.C.S. § 5548 20 Pa.C.S. §§ 3316, 5145, 7134, 7201-7214 (Chapter 72), 7301	
	SB 1359	1763	15 Pa.C.S. §§ 5548, 5549, 5585 20 Pa.C.S. §§ 751, 3316.1, 3504, 5306, 7137, 7191, 8113	
1995-96	HB 878	973	20 Pa.C.S. §§ 5404, 5414	
	HB 2713	3763	20 Pa.C.S. §§ 711, 712, 5511, 5512.1, 5513, 5518, 5518.1, 5521, 5522, 5531	
	SB 600	624	20 Pa.C.S. §§ 5601, 5602, 5603, 5621-5638	
	SB 1212	1410 2152	20 Pa.C.S. §§ 5403, 5414.1, 5415	
	SB 1578	2069	20 Pa.C.S. §§ 711, 712, 5511, 5512.1, 5513, 5518, 5518.1, 5521, 5522, 5531	
1993-94	SB 1662	2065 2432 2566	20 Pa.C.S. §§ 712, 724, 2101, 2502, 2517, 2521, 3101, 3102, 3121, 3504, 3531, 3701, 5101, 5404, 5602, 5603, 6110, 6111.2, 6117, 6201, 7183, 8601-8642 (Chapter 86)	1994 Act No. 102 Act of December 1, 1994 (P.L.655, No.102)
	SB 1663	2066	Act of June 17, 1971 (P.L.181, No.23), known as the Charitable Instruments Act of 1971	

²⁴⁶ Renumbered from 20 Pa.C.S. §§ 7201-7205 (Chapter 72).

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
1991-92	SB 3 ²⁴⁷	3 1173 1326 1756 2095	13 Pa.C.S. ²⁴⁸ §§ 3307, 3508, 4405, 8308 18 Pa.C.S. §§ 311, 509, 2901, 2905, 3206 20 Pa.C.S. §§ 102, 302, 711, 712, 721, 745, 777, 2206, 2514, 3122, 3155, 3182, 3324, 3504, 4112, 4121, 5115, 5144, 5401-5416 (Chapter 54), 5501, 5502, 5505, 5511, 5512, 5512.1, 5512.2, 5512.3, 5513, 5514, 5515, 5516, 5517, 5518, 5518.1, 5521, 5522, 5524, 5525, 5533, 5534, 5535, 5536, 5537, 5551, 5552, 5553, 5554, 5555, 5603, 5604, 6202, 7133, 8301, 8411 23 Pa.C.S. § 2711 42 Pa.C.S. ²⁴⁹ § 5322	1992 Act No. 24 Act of April 16, 1992 (P.L.108, No.24)
	SB 628	658	72 Pa.C.S. §§ 1707, 1708, 1711, 1712, 1716, 1730, 1744	
	SB 843	896	72 Pa.C.S. §§ 1702, 1707, 1711, 1717, 1781, 1792, 1796	
	SB 1117	1238	72 Pa.C.S. §§ 1718, 1753, 1755	
	SB 1118	1239 2587	20 Pa.C.S. §§ 711, 745*, 911, 2204, 2507, 2514, 2515, 2701 (Chapter 27), 3316, 3321, 3330*, 3503, 3532, 3701, 3702, 3703, 3706, 5164, 5301-5310 (Chapter 53 - Pennsylvania Uniform Gifts to Minors Act), 5301-5320 (Chapter 53 - Pennsylvania Uniform Transfers to Minors Act), 5513*, 5536, 5601, 5601.1, 5602, 5603, 5604, 5605, 5606, 5608, 5704, 6111.1, 6111.2, 6114, 7188, 7191, 7314.1, 7315.1, 8301	1992 Act No. 152 Act of December 16, 1992 (P.L.1163, No.152)
1989-90	HB 921	1039 2817	72 Pa.C.S. §§ 1707, 1708, 1711, 1712, 1716, 1730, 1744	
	HB 922	1040	72 Pa.C.S. §§ 1707, 1711	

²⁴⁷ A large number of amendments change the terminology from incompetent and incompetency to incapacitated person and incapacity.

²⁴⁸ Title 13 of the Pennsylvania Consolidated Statutes (13 Pa.C.S.) is the Uniform Commercial Code.

²⁴⁹ Title 42 of the Pennsylvania Consolidated Statutes (42 Pa.C.S.) is the Judicial Code.

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
	HB 923	1041	72 Pa.C.S. §§ 1702, 1707, 1711, 1717, 1781, 1792, 1796	
	SB 775	845 1348 2485	13 Pa.C.S. §§ 3307, 3508, 4405, 8308 18 Pa.C.S. §§ 311, 509, 2901, 2905, 3206 20 Pa.C.S. §§ 102, 302, 711, 712, 721, 745, 777, 911, 2204, 2206, 2507, 2514, 2515, 2519, 2701 (Chapter 27), 3122, 3155, 3182, 3316, 3321, 3324, 3503, 3504, 3532, 3701, 3702, 3703, 3706, 4112, 4121, 5115, 5144, 5164, 5301-5310 (Chapter 53 - Pennsylvania Uniform Gifts to Minors Act), 5301-5321 (Chapter 53 - Pennsylvania Uniform Transfers to Minors Act), 5501, 5502, 5505, 5511, 5512, 5512.1, 5512.2, 5512.3, 5513, 5514, 5515, 5516, 5517, 5518, 5518.1, 5521, 5522, 5524, 5525, 5533, 5534, 5535, 5536, 5537, 5551, 5552, 5553, 5554, 5555, 5601, 5603, 5604, 5704, 6111.1, 6111.2, 6114, 6202, 7133, 7184, 7188, 7191, 7315.1, 8301, 8411 23 Pa.C.S. § 2711 42 Pa.C.S. § 5322 72 Pa.C.S. §§ 1707, 1708, 1711, 1712, 1716, 1730, 1744	Final Passage in the Senate: June 27, 1989 Final Passage in the House: September 24, 1990 Senate Concurrence: October 2, 1990 Vetoed by the Governor: October 12, 1990 (Veto No. 3) Senate Motion to Override Veto Defeated (Veto Sustained): November 12, 1990
	SB 776	846 2237 2281	72 Pa.C.S. §§ 1707, 1708, 1711, 1712, 1716, 1730, 1744	
	SB 777	847	72 Pa.C.S. §§ 1707, 1711	
	SB 778	848	72 Pa.C.S. §§ 1702, 1707, 1711, 1717, 1781, 1792, 1796	
1987-88	HB 524	574 1511 2396	20 Pa.C.S. §§ 3154, 7303, 7310.1	1988 Act No. 99 Act of July 14, 1988 (P.L.553, No.99)

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
	SB 186	192 2169	20 Pa.C.S. §§ 745, 911, 2204, 2507, 2514, 2515, 2519, 2701 (Chapter 27), 3154, 3316, 3321, 3701, 3702, 3703, 3706, 5301-5310 (Chapter 53 - Pennsylvania Uniform Gifts to Minors Act), 5301-5321 (Chapter 53 - Pennsylvania Uniform Transfers to Minors Act), 5513, 5536, 5603, 5604, 5704, 6111.1, 6111.2, 6114, 7188, 7191, 7315.1 The act of May 31, 1923 (P.L.468, No.256), known as the Uniform Fiduciaries Act	
	SB 187	193	72 Pa.C.S. §§ 1702, 1781	
	SB 188	194	§§ 401 & 403 of the act of April 2, 1980 (P.L.63, No.26), known as the Divorce Code	<i>See</i> 1988 Act No. 13 Act of February 12, 1988 (P.L.66, No.13) ²⁵⁰
	SB 1230	1714	24 Pa.C.S. ²⁵¹ § 8533 71 Pa.C.S. ²⁵² § 5953 72 Pa.C.S. §§ 1707, 1708, 1709, 1711, 1716, 1717, 1730 § 1716 of the act of July 28, 1953 (P.L.723, No.230), known as the Second Class County Code § 27 of the act of September 23, 1959 (P.L.970, No.400) (cities of the second class A) § 27 of the act August 31, 1971 (P.L.398, No.96), known as the County Pension Law § 115 of the act of February 1, 1974 (P.L.34, No.15), known as the Pennsylvania Municipal Retirement Law	

²⁵⁰ Based on Senate Bill No. 409 (Printer's Nos. 441, 1062, 1180, 1679 & 1734).

²⁵¹ Title 24 of the Pennsylvania Consolidated Statutes (24 Pa.C.S.) relates to Education.

²⁵² Title 71 of the Pennsylvania Consolidated Statutes (71 Pa.C.S.) relates to State Government.

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
1985-86	SB 1162	1466 1688	20 Pa.C.S. §§ 745, 911, 2507, 2514, 2701 (Chapter 27), 3316, 3701, 3702, 3703, 3706, 5301-5310 (Chapter 53 - Pennsylvania Uniform Gifts to Minors Act), 5301-5321 (Chapter 53 - Pennsylvania Uniform Transfers to Minors Act), 5536, 5603, 6111.1, 6114, 6305.1, 7188, 7315.1 The act of May 31, 1923 (P.L.468, No.256), known as the Uniform Fiduciaries Act	
	SB 1512	2098	24 Pa.C.S. § 8533 71 Pa.C.S. § 5953 72 Pa.C.S. §§ 1707, 1708, 1709, 1711, 1716, 1717, 1730 § 1716 of the act of July 28, 1953 (P.L.723, No.230), known as the Second Class County Code § 27 of the act of September 23, 1959 (P.L.970, No.400) (cities of the second class A) § 27 of the act August 31, 1971 (P.L.398, No.96), known as the County Pension Law § 115 of the act of February 1, 1974 (P.L.34, No.15), known as the Pennsylvania Municipal Retirement Law	
1983-84	SB 1079	1368 1480 2200 2305	20 Pa.C.S. §§ 304, 745, 2514, 3132.1, 3301, 3501.2, 3502, 3539, 3540, 5163.1, 5533.1, 6201, 6202, 6204, 6205, 6206, 6305.1, 7183, 7314, 7315, 7315.1 Article XIII.1 of the act of April 9, 1929 (P.L.343, No.176), known as The Fiscal Code	1984 Act No. 182 Act of October 12, 1984 (P.L.929, No.182)
	SB 1080	1369 2073 2199	§ 404(a) of the act of November 30, 1965 (P.L.847, No.356), known as the Banking Code of 1965 ²⁵³	1984 Act No. 125 Act of July 6, 1984 (P.L.606, No.125)

²⁵³ The bill also amended or added other sections of the act.

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
	SB 1353	1918	20 Pa.C.S. §§ 3155, 5514, 5551, 5552, 5553, 5554	
	SB 1354	1919	20 Pa.C.S. §§ 5500, 5501, 5510, 5511, 5512.1, 5518, 5521	
1981-82	SB 635	652 1080 1274	20 Pa.C.S. §§ 2206, 2209, 2210, 3101, 3132.1, 3539*, 3701-3705 (Chapter 37 - Estate Tax Apportionment), 3701-3706 (Chapter 37 - Apportionment of Death Taxes), 4102, 5144, 5147, 5153, 5302, 5303, 5305, 5308, 5309, 5505, 5515, 5521, 5536, 5537, 5601-5602 (Chapter 56 - Powers of Attorney), 5601-5607 (Chapter 56 - Powers of Attorney), 6102, 6110, 6202, 7121, 7133, 7143, 7183, 7185, 7186 Act of March 14, 1777 (1Sm.L.443, Ch.737) (various county offices)	1982 Act No. 26 Act of February 18, 1982 (P.L.45, No.26)
	SB 636	653 1650 1980 2016 2190 2249	72 Pa.C.S. §§ 1701-1796 (Chapter 17 - Inheritance and Estate Taxes) Act of April 7, 1826 (P.L.227, No.72) (collateral inheritances) Act of May 11, 1901 (P.L.173, No.139) (inheritance tax) § 12 of the act of June 20, 1919 (P.L.521, No.258) (transfer of property) Act of May 4, 1927 (P.L.727, No.375) (transfer of property) Act of May 8, 1929 (P.L.1673, No.531) (refunds) Act of May 23, 1949 (P.L.1726, No.528), known as the Uniform Act on Interstate Compromise and Arbitration of Inheritance Taxes Act of June 15, 1961 (P.L.373, No.207), known as the Inheritance and Estate Tax Act of 1961	1982 Act No. 255 Act of December 13, 1982 (P.L.1086, No.255)

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
	SB 637	654	§ 491(1) of the act of April 12, 1951 (P.L.90, No.21), known as the Liquor Code ²⁵⁴	
1979-80	HB 213	229 1732 1741 3422	23 Pa.C.S. Parts III (Adoption - §§ 2101-2908) and IX (Miscellaneous Provisions - §§ 8302-8303) Act of July 9, 1935 (P.L.612, No.214) (adoption) § 4 of the act of July 30, 1947 (P.L.1180, No.491) (adoption) § 6 of the act of August 26, 1953 (P.L.1411, No.400) (adoption) Act of July 24, 1970 (P.L.620, No.208), known as the Adoption Act	1980 Act No. 163 Act of October 15, 1980 (P.L.934, No.163)
	SB 768	827 1487 1591 1936	20 Pa.C.S. §§ 761, 2102, 2203, 2204, 3101, 3102, 3133, 3153, 3174, 3539*, 3540, 3543, 6102, 6109, 7183, 7187, 7192 Act of August 9, 1971 (P.L.286, No.74), known as the Disposition of Abandoned and Unclaimed Property Act	1980 Act No. 118 Act of July 11, 1980 (P.L.565, No.118)
	SB 1400	1779	§ 491(1) of the act of April 12, 1951 (P.L.90, No.21), known as the Liquor Code	
1977-78	SB 1000	1155 1451 1779	20 Pa.C.S. §§ 2101, 2102, 2103, 2104, 2105, 2111, 2201-2211 (Chapter 22), 2508, 2509, 2510, 2511, 2512, 2513, 3174, 6101, 6111, 6111.1	1978 Act No. 23 Act of April 18, 1978 (P.L.42, No.23)
	SB 1001	1156 1788	20 Pa.C.S. §§ 712, 726, 727, 3162, 5116, 5161, 5163, 5531, 5533, 6102*, 6104, 7181, 8109	1978 Act No. 37 Act of April 28, 1978 (P.L.77, No.37)

²⁵⁴ This amendment was subsequently inserted into 1982 Senate Bill No. 1335 (Printer's No. 2127) but was not enacted with the remainder of that bill (which became 1982 Act No. 311).

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
1975-76	HB 1818	2327	20 Pa.C.S. § 3132.1	1976 Act No. 105 Act of June 24, 1976 (P.L.434, No.105)
	SB 1142	1365	20 Pa.C.S. §§ 2101, 2101.1, 2102, 2102.1, 2103, 2104, 2105, 2111, 2201-2211 (Chapter 22), 2508, 2509, 2510, 2511, 2512, 2513, 6101, 6111, 6111.1	
	SB 1143	1366	20 Pa.C.S. §§ 6301-6306 (Chapter 63)	1976 Act No. 134 Act of July 9, 1976 (P.L.547, No.134)
	SB 1144	1367 1786	20 Pa.C.S. §§ 102, 712, 908, 2104, 2106, 2108, 2109, 2109.1, 2112, 2113, 2114, 2501, 2507, 2509, 2512, 2513, 2514, 2520, 3101, 3174, 3357, 3376, 3532, 3703, 5163.1, 5701, 6102, 6114, 6118, 7183, 7188, 8111	1976 Act No. 135 Act of July 9, 1976 (P.L.551, No.135)
	SB 1145	1368	20 Pa.C.S. §§ 6103, 6201-6207 (Chapter 62)	1976 Act No. 136 Act of July 9, 1976 (P.L.562, No.136)
	SB 1146	1369	20 Pa.C.S. § 3101	
	SB 1147	1370 2067	20 Pa.C.S. § 5536	1976 Act No. 144 Act of July 9, 1976 (P.L.836, No.144)
1973-74	HB 1516 ²⁵⁵	1943	20 Pa.C.S. §§ 5551-5564	
	HB 2576	3613 3788	§§ 102 and 306 of the act of October 20, 1966 (3 rd Sp. Sess., P.L.96, No.6), known as the Mental Health and Mental Retardation Act of 1966	
	HB 2577	3614 3789	20 Pa.C.S. §§ 5501, 5511, 5512, 5515, 5517, 5519, 5519.1, 5526, 5527, 5531	

²⁵⁵ This bill is the subject of the September 1974 report.

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
	SB 775	845 1460 1949 2037 2309 2724	20 Pa.C.S. §§ 711, 712, 721, 779, 908, 922, 925, 2106, 2501, 2503, 2504, 2504.1, 2510, 2511, 3101,* 3102, 3122, 3132, 3133, 3134, 3137, 3153, 3351, 3353, 3356, 3360, 3501, 3501.1, 3531, 3545, 5101, 5103, 5153, 5154, 5155, 5303, 5305, 5505, 5511, 5515, 5521, 5533.1, 6103, 6111, 6118/6119, 7133, 7306, 7319, 8201-8234 (Chapter 82), 8301-8306 (Chapter 83), 8604 <i>See</i> May 1973 Report, <i>supra</i> pp. 116-118 for the 86 unconsolidated acts affected by this legislation, with the addition of the following: § 7 of the act of October 28, 1851 (P.L.724, No.433) (miscellaneous) Act of April 11, 1866 (P.L.780, No.771) (real estate)	1974 Act No. 293 Act of December 10, 1974 (P.L.867, No.293)
	SB 776	846	20 Pa.C.S. § 712	
	SB 777	847	20 Pa.C.S. §§ 2507, 6119 Act of December 28, 1972 (P.L.1666, No.356) (gifts)	
	SB 778	848	20 Pa.C.S. § 3121	1974 Act No. 130 Act of June 27, 1974 (P.L.383, No.130)
	SB 779	849 1552	20 Pa.C.S. § 3376	
	SB 780	850	20 Pa.C.S. §§ 4301-4306 (Chapter 43) 20 Pa.C.S. Chapter 84 - Subchapter A	1974 Act No. 294 Act of December 10, 1974 (P.L.896, No.294)
	SB 781	851	20 Pa.C.S. §§ 5302, 5305, 5308	1973 Act No. 104 Act of November 2, 1973 (P.L.322, No.104)

Legislative Session	Bill Number	Printer's Number(s)	Relevant Provisions Included (Amendments, Repeals or Additions)	Enactment or Veto
	SB 782	852 2373 2624	20 Pa.C.S. §§ 5501, 5536,* 5601-5602 (Chapter 56)	1974 Act No. 295 Act of December 10, 1974 (P.L.899, No.295)
	SB 783	853	20 Pa.C.S. §§ 7302, 7310	
	SB 1648 ²⁵⁶	2108	20 Pa.C.S. §§ 2101, 2101.1, 2102, 2102.1, 2103, 2104, 2105, 2108, 2109.1, 2111, 2112, 2113, 2114, 2201-2211 (Chapter 22), 2501, 2508, 2509, 2510, 2511, 2512, 2513, 2514, 2520, 6101, 6111, 6114	
1971-72	SB 1225	1495 1552 1841	20 Pa.C.S. §§ 101-8815 <i>See infra</i> pp. 266-267 for the acts and parts of acts repealed	1972 Act No. 164 Act of June 30, 1972 (P.L.508, No.164)

²⁵⁶ The provisions of this bill were not recommended by the Advisory Committee in its May 1973 report but were subsequently endorsed by the Advisory Committee.

THE PROBATE, ESTATES AND FIDUCIARIES CODE AS ENACTED IN 1972

The following is the detailed structure of the Probate, Estates and Fiduciaries Code as enacted in 1972.²⁵⁷

CHAPTER 1: SHORT TITLE AND DEFINITIONS

- § 101. Short title.
- § 102. Definitions.

CHAPTER 3: OWNERSHIP OF PROPERTY; LEGAL TITLE AND EQUITABLE ESTATE

- § 301. Title to real and personal estate of a decedent.
 - (a) Personal estate.
 - (b) Real estate.
- § 302. Title to real and personal estate of an incompetent.
- § 303. Title to real and personal estate of a minor.

CHAPTER 7: ORPHANS' COURT DIVISIONS

SUBCHAPTER A: ORGANIZATION

- § 701. Orphans' court divisions.
 - (a) Judicial districts having separate orphans' court divisions.
 - (b) Judicial districts having no separate orphans' court division.
- § 702. Sessions; terms.
- § 703. Rules.

SUBCHAPTER B: JURISDICTION

- § 711. Mandatory exercise of jurisdiction through orphans' court division in general.
- § 712. Nonmandatory exercise of jurisdiction through orphans' court division.
- § 713. Special provisions for Philadelphia County.
- § 714. Conflict of laws.
- § 715. Incidental powers.

SUBCHAPTER C: VENUE

- § 721. Venue of decedents' and minors' estates.
- § 722. Venue of trust estates.
- § 723. Situs of testamentary trust.

²⁵⁷ Act of June 30, 1972 (P.L.508, No.164). 1972 Senate Bill No. 1225 (Printer's Nos. 1495, 1552 & 1841) was the vehicle for the act.

- § 724. Situs of inter vivos trust.
 - (a) When provided for in trust instrument.
 - (b) Not provided for in trust instrument.

§ 725. Change of situs; order of court.

SUBCHAPTER D: JUDGES

§ 731. Powers.

§ 732. Powers when the court is not in session.

SUBCHAPTER E: DUTIES OF THE CLERK AND SHERIFF

§ 741. Duties of the clerk.

§ 742. Dockets.

§ 743. Bill of costs.

§ 744. Translation of foreign language documents.

§ 745. Advertisement of accounts.

- (a) Requirement of notice; contents of notice.
- (b) Manner of advertisement.
- (c) Cost of advertisement.

§ 746. Money paid into court.

§ 747. Powers and duties of the sheriff.

§ 748. Fees.

SUBCHAPTER F: MASTERS, AUDITORS, EXAMINERS, GUARDIANS AD LITEM AND TRUSTEES AD LITEM

§ 751. Appointment; purpose.

§ 752. Compensation.

§ 753. Subpoenas.

§ 754. Power to administer oaths.

SUBCHAPTER G: PROCEDURE

§ 761. Petitions.

§ 762. Accounts.

§ 763. Writs of habeas corpus.

§ 764. Citation.

§ 765. Service of citation.

§ 766. Proof of service.

§ 767. Parties in interest.

§ 768. Manner of service; proof.

§ 769. Power of orphans' court division.

§ 771. Decree without prior hearing; attachment; sequestration.

§ 772. Injunctions.

§ 773. Subpoenas.

§ 774. Depositions and discovery.

§ 775. Perpetuation of testimony and court records.

§ 776. Testimony in proceedings removed from register.

§ 777. Right to jury trial; discretion of orphans' court division.

- (a) Title to property.
- (b) Determination of incompetency.
- (c) Will contest and other matters.
- (d) Waiver of right.

- § 778. Procedure for jury trials.
 - (a) Jury.
 - (b) Combined hearings and trials.
 - (c) Rules of court.
- § 781. Methods of enforcement.
- § 782. Procedure on attachment of the person.
 - (a) Direction of writs.
 - (b) Discharge of person attached for contempt.
- § 783. Procedure on sequestration of real or personal property.
- § 784. Procedure on execution on personal property.
- § 785. Procedure on attachment execution.
- § 786. Procedure on execution on real estate.
 - (a) Filing.
 - (b) Satisfaction and discharge.
 - (c) Executions.
- § 791. Allowance and allocation.
- § 792. Right of appeal.
- § 793. Effect of appeal.
- § 794. Disposition of cases on appeal.

CHAPTER 9: REGISTER OF WILLS

SUBCHAPTER A: JURISDICTION AND POWERS

- § 901. Register's jurisdiction.
- § 902. Deputy register.
- § 903. Witnesses; testimony.
- § 904. Witness fees.
- § 905. Enforcement of subpoenas, orders and costs.
- § 906. Caveat.
 - (a) Bond.
 - (b) Failure to give bond.
 - (c) Costs.
- § 907. Certification of records to court.
- § 908. Appeals.
 - (a) When allowed.
 - (b) Bond.
 - (c) Effect of appeal.
 - (d) Excepted appeals.
- § 909. Bill of costs.
- § 910. Transmission of accounts to the court.

SUBCHAPTER B: RECORDS AND CERTIFIED COPIES

- § 921. Wills.
- § 922. Inventories and appraisements.
- § 923. Certified copies.
- § 924. Recording proceedings in another county.

CHAPTER 21: INTESTATE SUCCESSION

- § 2101. Intestate descent.
- § 2102. Share of surviving spouse.
- § 2103. Shares of others than surviving spouse.
- § 2104. Rules of descent.
- § 2105. Spouse's rights.
 - (a) Widow.
 - (b) Surviving husband.
- § 2106. Forfeiture.
 - (a) Husband's share.
 - (b) Wife's share.
 - (c) Slayer's share.
 - (d) Surviving spouse as witness.
- § 2107. Persons born out of wedlock.
 - (a) Child of mother.
 - (b) Marriage of parents.
- § 2108. Adopted person.
- § 2109. Advancements.
 - (a) In general.
 - (b) Valuation.
- § 2110. Spouse's allowance; procedure.
- § 2111. Procedure to establish title to real property when spouse claims entire estate.
- § 2112. Property distributable to the Commonwealth.
- § 2113. Limitations of claims.
 - (a) Shares not claimed within seven years.
 - (b) Pleading limitation.
- § 2114. Personal estate of nonresident.

CHAPTER 25: WILLS

- § 2501. Who may make a will.
 - (a) Persons 21 or older.
 - (b) Persons in military service and mariners.
- § 2502. Form and execution of a will.
- § 2503. Nuncupative wills.
 - (a) When permissible.
 - (b) Property disposable.
 - (c) Effect on prior will.
- § 2504. Witnesses.
 - (a) General rule.
 - (b) Foreign execution.
- § 2505. Revocation of a will.
- § 2506. Revival of revoked or invalid will.
- § 2507. Modification by circumstances.
- § 2508. Change by election of surviving spouse.
 - (a) Right of election.
 - (b) Share of estate.
 - (c) Power of appointment.

- § 2509. Forfeiture of right of election.
 - (a) By husband.
 - (b) By wife.
 - (c) Slayer.
 - (d) Surviving spouse as witness.
- § 2510. How election made.
- § 2511. Time for making election.
- § 2512. Failure to make an election.
 - (a) Effect.
 - (b) Personal right.
- § 2513. Grantee or lienholder.
- § 2514. Rules of interpretation.
- § 2515. Devise or bequest to trust.
- § 2516. Devise in fee tail abolished.
- § 2517. Rule in Shelley's case.
- § 2518. Alienage.
- § 2519. Testamentary guardian.
 - (a) Guardian of the person.
 - (b) Guardian of the estate.
- § 2520. Personal estate of nonresident.

**CHAPTER 31: DISPOSITIONS INDEPENDENT OF LETTERS; FAMILY EXEMPTION;
PROBATE OF WILLS AND GRANT OF LETTERS**

SUBCHAPTER A: DISPOSITIONS INDEPENDENT OF LETTERS

- § 3101. Payment of wages, salary, vacation benefits to family.
- § 3102. Settlement of small estates on petition.

SUBCHAPTER B: FAMILY EXEMPTION

- § 3121. When allowable.
- § 3122. Payment or delivery of exemption.
 - (a) Items claimed.
 - (b) Property set aside for minors.
 - (c) Control of court.
- § 3123. Payment from real estate.
 - (a) Appraisement.
 - (b) Real estate valued at more than amount claimed.
 - (c) Payment of surplus.
 - (d) Recording and registering decrees.
 - (e) Costs and expenses.
- § 3124. Income.
- § 3125. Other remedies.
- § 3126. Grantee or lienholder.
 - (a) Rights accruing before death; purchase money obligation.
 - (b) Rights accruing after death.

SUBCHAPTER C: PROBATE

- § 3131. Place of probate.
- § 3132. Manner of probate.

- § 3133. Limit of time for probate.
 - (a) Original probate.
 - (b) Conclusiveness of original probate.
 - (c) Effect upon grantee or mortgagee.
- § 3134. Nuncupative wills.
- § 3135. Wills in foreign language.
- § 3136. Wills probated outside the Commonwealth.
- § 3137. Enforcing production of will.
- § 3138. Later will or codicil.

SUBCHAPTER D: GRANT OF LETTERS

- § 3151. Proper county.
- § 3152. When 21 years elapsed.
- § 3153. Contents of petition.
- § 3154. Affidavit and oath.
- § 3155. Persons entitled.
 - (a) Letters testamentary.
 - (b) Letters of administration.
 - (c) Time limitation.
- § 3156. Persons not qualified.
- § 3157. Nonresidents.
 - (a) Discretion of register.
 - (b) Power of attorney.
- § 3158. Letters of administration C.T.A.
- § 3159. Letters of administration D.B.N. or D.B.N.C.T.A.
- § 3160. Letters of administration durante minoritate, durante absentia, and pendente lite.
- § 3161. Oath of personal representative.
- § 3162. Advertisement of grant of letters.

SUBCHAPTER E: PERSONAL REPRESENTATIVE; BOND

- § 3171. Individual estate.
- § 3172. Register's responsibility.
- § 3173. Fiduciary estate.
- § 3174. When not required.
 - (a) Corporate personal representative.
 - (b) Resident executor.
 - (c) Nonresident executor.
- § 3175. Requiring or changing amount of bond.

SUBCHAPTER F: PERSONAL REPRESENTATIVE; REVOCATION OF LETTERS; REMOVAL AND DISCHARGE

- § 3181. Revocation of letters.
 - (a) When no will.
 - (b) When a will.
- § 3182. Grounds for removal.
- § 3183. Procedure for and effect of removal.
- § 3184. Discharge of personal representative and surety.

CHAPTER 33: ADMINISTRATION AND PERSONAL REPRESENTATIVES

SUBCHAPTER A: INVENTORY

- § 3301. Duty of personal representative.
 - (a) General assets.
 - (b) Real estate outside of Commonwealth.
- § 3302. Valuations.
- § 3303. Supplemental inventory.
- § 3304. Claims against personal representative.
- § 3305. Objections to inventory.

SUBCHAPTER B: PERSONAL REPRESENTATIVES; POWERS, DUTIES AND LIABILITIES

- § 3311. Possession of real and personal estate; exception.
- § 3312. Renunciation of right to administer property.
- § 3313. Liability insurance.
- § 3314. Continuation of business.
- § 3315. Incorporation of estate's business.
- § 3316. Investment of funds.
- § 3317. Claims against co-fiduciary.
- § 3318. Revival of judgments against personal representative.
- § 3319. Power of attorney; delegation of power over subscription rights and fractional shares; authorized delegations.
 - (a) Power of attorney.
 - (b) Delegation of power over subscription rights and fractional shares.
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With the enactment of the PEF Code, the following were repealed in their entirety:

- Act of April 21, 1856 (P.L.486, No.511) (real estate).
- Act of May 19, 1874 (P.L.206, No.134) (orphans' courts).
- § 2 of the act of June 14, 1897 (P.L.144, No.121) (real estate).
- § 3 of the act of June 15, 1897 (P.L.159, No.133) (sales and conveyances).
- Last paragraph of § 9 of the act of June 7, 1917 (P.L.363, No.188), known as the Orphans' Court Act of 1917.
- Act of June 7, 1917 (P.L.388, No.189), known as the Revised Price Act of 1917.
- § 24 of the act of June 7, 1917 (P.L.447, No.193), known as the Fiduciaries Act of 1917.
- Act of May 7, 1923 (P.L.150, No.113) (writs of scire facias).
- Act of April 24, 1929 (P.L.647, No.273) (guardians).
- Act of June 19, 1941 (P.L.138, No.75) (simultaneous deaths).
- Act of August 5, 1941 (P.L.816, No.301) (slayers).
- Act of March 20, 1942 (P.L.13, No.3) (military service).
- Act of May 24, 1945 (P.L.944, No.374) (fiduciary contracts).
- Act of April 24, 1947 (P.L.80, No.37), known as the Intestate Act of 1947.
- Act of April 24, 1947 (P.L.89, No.38), known as the Wills Act of 1947.
- Act of April 24, 1947 (P.L.100, No.39), known as the Estates Act of 1947.
- Act of June 5, 1947 (P.L.477, No.210) (employee benefits).
- Act of July 3, 1947 (P.L.1283, No.516), known as the Principal and Income Act of 1947.
- Act of April 18, 1949 (P.L.512, No.121), known as the Fiduciaries Act of 1949.
- Act of May 26, 1949 (P.L.1828, No.544), known as the Fiduciaries Investment Act of 1949.
- Act of June 28, 1951 (P.L.612, No.158), known as the Incompetents' Estates Act of 1951.
- Act of June 28, 1951 (P.L.638, No.159), known as the Register of Wills Act of 1951.
- Act of August 10, 1951 (P.L.1163, No.263), known as the Orphans' Court Act of 1951.
- Act of August 24, 1951 (P.L.1405, No.338), known as the Estate Tax Apportionment Act of 1951.
- Act of May 1, 1953 (P.L.190, No.10) (compensation).
- Act of July 28, 1953 (P.L.659, No.198) (compromise or settlement).
- Act of July 28, 1953 (P.L.674, No.209) (partial distributions and certain payments).
- Act of June 21, 1957 (P.L.358, No. 199), known as the Pennsylvania Uniform Gifts to Minors Act.
- Act of September 21, 1959 (P.L.923, No.371) (combining trusts).
- Act of December 1, 1959 (P.L.1637, No.602) (employee benefit plans).

- Act of August 11, 1967 (P.L.224, No.80) (payments to beneficiaries).
- Act of July 18, 1969 (P.L.163, No.66) (charitable uses or trusts).
- Act of December 16, 1969 (P.L.366, No.161), known as the Uniform Anatomical Gift Act.

In addition, the following acts were expressly saved from repeal:

- Act of March 31, 1812 (P.L.259, No.CXCIV) (joint tenancy).
- Act of April 18, 1945 (P.L.253, No.113) (guardians).
- Act of September 29, 1951 (P.L.1645, No.432) (historical documents).

MEMBERSHIP OF THE ADVISORY COMMITTEE ON DECEDENTS' ESTATES LAWS

ADVISORY COMMITTEE CHAIRS		
Service	Chair	County
1945-1957	Robert Brigham, Esquire	Philadelphia
1958-1973	The Honorable Mark E. Lefever	Philadelphia
1973-1981	William H. Eckert, Esquire	Allegheny
1981-1993	George J. Hauptfuhrer, Jr., Esquire	Philadelphia
1993-2001	William McC. Houston, Esquire	Allegheny
2001-2013	Edward M. Watters, III, Esquire	Chester
2013-	William Campbell Ries, Esquire	Allegheny

ADVISORY COMMITTEE MEMBERS		
Member	County	Service
The Honorable Anthony R. Appel	Lancaster	1971-1985
Robert W. Archbald, Esquire	Philadelphia	1945-1951
Richard J. Ashby, Jr., Esquire	Lancaster	1983-1993 2001-2008
Thomas A. Beckley, Esquire	Dauphin	1971-
Paul Bedford, Esquire	Luzerne	1945-1951
The Honorable John C. Bell	Pennsylvania Supreme Court	1945-1947
Mark Bookman, Esquire	Allegheny	2000-
The Honorable Hugh C. Boyle	Allegheny	1959-1986
The Honorable W. Walter Braham	Lawrence	1945-1979
Philip A. Bregy, Esquire	Philadelphia	1947-1986
Robert Brigham, Esquire	Philadelphia	1945-1957
Norman H. Brown, Esquire	Philadelphia	1971-1985
Mitchell E. Chadrow, Esquire	Montgomery	2005-
Robert Clofine, Esquire	York	2010-
Paul E. Clouser, Esquire	Dauphin	1971-1989
Reuben E. Cohen, Esquire	Philadelphia	1949-1988
Ira B. Coldren, Jr., Esquire	Fayette	1992-2006
William R. Cooper, Esquire	Montgomery	1997-
William J. Copeland, Esquire	Allegheny	1971-1975
Robert E. Diehl, Jr., Esquire	Northumberland	1992-
The Honorable Stephanie Domitrovich	Erie	2009-
The Honorable Calvin S. Drayer, Jr.	Montgomery	1992-
Robert F. Duguay, Esquire	Dauphin	1971-1982

ADVISORY COMMITTEE MEMBERS		
Member	County	Service
Charles H. Ealy, Esquire	Somerset	1948-1949
William H. Eckert, Esquire	Allegheny	1945-1981
Karen A. Fahrner, Esquire	Delaware	2007-
Robert C. Fernandez, Esquire	Montgomery	1977-1994
The Honorable Roger M. Fischer	Erie	1992-2004
Julia B. Fisher, Esquire	Philadelphia	2003-
Roland Fleer, Esquire	Montgomery	1945-1975
Robert L. Freedman, Esquire	Philadelphia	1982-
Robert I. Friedman, Esquire	Philadelphia	2009-
The Honorable Ethan A. Gearhart	Lehigh	1945-1983
J. Frederick Gehr, Esquire	Lycoming	1971-1990
G. Donald Gerlach, Esquire	Allegheny	1975-2000
W. Pitt Gifford, Esquire	Erie	1945-1961
Jay C. Glickman, Esquire	Montgomery	2002-
H. Amos Goodall, Jr., Esquire	Centre	2011-
Edward J. Greene, Esquire	Allegheny	1992-2003
Richard L. Grossman, Esquire	Montgomery	1971-
George J. Hauptfuhrer, Jr., Esquire	Philadelphia	1971-1993
Neil E. Hendershot, Esquire	Dauphin	1992-
Thomas O. Hiscott, Esquire	Montgomery	2007-
The Honorable Andrew Hourigan	Luzerne	1945-1951
William McC. Houston, Esquire	Allegheny	1971-2001
James A. Humphreys, III, Esquire	Lancaster	1984-1998
The Honorable David G. Hunter	Philadelphia	1945-1961
A.J. White Hutton, Esquire	Franklin	1945-1961
Frederick F. Jones, Esquire	Erie	1971-1977
David J. Kaufman, Esquire	Philadelphia	1985-2009
The Honorable Robert A. Kelly	Allegheny	2002-2010
William H. Latimer, Jr., Esquire	Allegheny	1975-1981
The Honorable Anne E. Lazarus	Pennsylvania Superior Court	2004-
The Honorable Mark E. Lefever	Philadelphia	1945-1973
Robert P. Leiby, Jr., Esquire	Philadelphia	1975-1996
Shippen Lewis, Esquire	Philadelphia	1945-1951
The Honorable William W. Litke	Centre	1945-1991
John J. Lombard, Jr., Esquire	Philadelphia	1992-
Alan S. Loose, Esquire	Carbon	1945-1972
The Honorable J. Paul MacElree	Chester	1945-1971
James F. Mannion, Esquire	Montgomery	2006-
The Honorable Frederick A. Marx	Berks	1945-1961
Benjamin G. McFate, Esquire	Venango	1975-1983
Edwin L.R. McKean, Esquire	Erie	1992-2007
Ralph D. McKee, Esquire	Allegheny	1945-1975
Richard G. Miller, Esquire	Washington	1945-1949
John F. Meck, Esquire	Allegheny	2001-
Michael J. Mullaugh, Esquire	Allegheny	1994-
R. Thomas Murphy, Esquire	Franklin	2010-

ADVISORY COMMITTEE MEMBERS		
Member	County	Service
The Honorable Lawrence O'Toole	Allegheny	2010-
The Honorable Paula Francisco Ott	Pennsylvania Superior Court	2001-
The Honorable Stanley R. Ott	Montgomery	2010-
The Honorable Edmund S. Pawelec	Philadelphia	1978-2004
Richard L. Placey, Esquire	Dauphin	1985-
Raymond M. Remick, Esquire	Philadelphia	1945-1949
The Honorable Karl E. Richards	Dauphin	1945-1961
William Campbell Ries, Esquire	Allegheny	1983-
William M. Robinson, Esquire	Allegheny	1945-1961
Bruce A. Rosenfield, Esquire	Philadelphia	1992-
Michael J. Saile, Esquire	Bucks	2003-
The Honorable Edwin H. Satterthwaite	Bucks	1971-1985
James G. Schmidt, Esquire	Philadelphia	1949-1995
Pam H. Schneider, Esquire	Philadelphia	1992-2011
Dean John J. Sciallo	Allegheny	1978-2000
Arthur M. Scully, Esquire	Allegheny	1945-1949
Clarence L. Shaver, Esquire	Somerset	1945-1961
The Honorable Louis Sherman	Philadelphia	1977-1984
K.L. Shirk, Jr., Esquire	Lancaster	1983-2006
M. Paul Smith, Esquire	Montgomery	1947-1998
Boyd Lee Spahr, Esquire	Philadelphia	1945-1961
Thomas Stokes, Esquire	Philadelphia	1945-1951
J. Pennington Straus, Esquire	Philadelphia	1971-1996
The Honorable Lee F. Swope	Dauphin	1971-1991
The Honorable Alfred L. Taxis	Montgomery	1971-1985
Regina O. Thomas, Esquire	Philadelphia	1985-2011
The Honorable Robert W. Tredinnick	Montgomery	1985-1987
The Honorable Thomas P. Trimble	Allegheny	1945-1951
The Honorable Edward L. Van Roden	Delaware	1949-1972
Paul C. Wagner, Esquire	Philadelphia	1945-1979
Donald R. Waisel, Esquire	Dauphin	1978-2008
Edward M. Watters, III, Esquire	Chester	1992-
Robert B. Wolf, Esquire	Allegheny	2000-
Lenard Wolffe, Esquire	Philadelphia	1977-1978
The Honorable Lawrence E. Wood	Chester	1992-2002
W. Steven Woodward, Esquire	Chester	2011-
C. Thomas Work, Esquire	Berks	1985-
The Honorable A. Kirk Wrenshall	Washington	1945-1972
The Honorable J. Colvin Wright	Pennsylvania Superior Court	1945-1978
The Honorable Vincent X Yakowicz	Cumberland	1971-2010
The Honorable Paul R. Zavarella	Allegheny	1985-2002
Adolph L. Zeman, Esquire	Washington	1945-1976