

Rule 231. Custodian of minors.

(a) Petition for successor custodian.

A petition for the appointment of a successor custodian pursuant to *D.C. Code § 21-318(d)* shall be typewritten, double-spaced, and verified by the petitioners. The petition shall set forth:

(1) The residence, citizenship and freedom from legal disability of the proposed successor custodian;

(2) The relationship of the proposed successor custodian to the minor;

(3) By what right the petitioner makes application, and, if the application is not for petitioners appointment, by what right the proposed successor custodian may be appointed;

(4) The name, residence and date of birth of the minor;

(5) The names and residence(s) of the parents of the minor and the date of death of any deceased parent;

(6) The nature, location and estimated value of the custodial property;

(7) Whether to require the successor custodian to give appropriate bond pursuant to SCR-PD 201(a) or 204(g);

(8) Whether an accounting of the predecessor custodian should be required pursuant to *D.C. Code § 21-319(b)*.

(b) Other transfers by a fiduciary.

A petition by a trustee for an irrevocable transfer in excess of \$ 10,000 in value to a minor pursuant to *D.C. Code § 21-306* shall be typewritten, double-spaced, and verified by the petitioner. The Petition shall set forth:

(1) The name, residence and date of birth of the minor for whom authority to distribute is sought, as well as the basis for the minor's entitlement to share in the trust;

(2) The nature, location and estimated value of the trust assets to be distributed to the minor;

(3) Facts to show that the transfer is in the best interests of the minor;

(4) Facts to show that the transfer is not prohibited by or inconsistent with the trust agreement, or other governing instrument;

(5) Facts to show that the trustee will effect the transfer in accordance with *D.C. Code § 21-309* (and, in particular, where the custodial property is money, by payment or delivery to the broker or the financial institution for credit in the custodial account).