



CAPTION

Trust Under Will of Augustus T. Ashton, Deceased Dated January 20, 1950

Appeal of: Elizabeth A. Reed

CASE INFORMATION

Initiating Document: Order Granting Petition for Allowance of Appeal

Case Status: Active

Journal Number:

Case Category: Civil Case Type(s): Estate/Probate/Wills/Intestate

CONSOLIDATED CASES

RELATED CASES

COUNSEL INFORMATION

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 Pro Se: No
 IFP Status:

SUPREME COURT INFORMATION

Appeal From: the Judgment of Superior Court entered on 6/3/2020 at No. 3609 EDA 2018 affirming, reversing and remanding the Order entered on 7/9/2018 in the Court of Common Pleas, Philadelphia County, Orphans' Court Division at No. 1039 ST of 1952.

Probable Jurisdiction Noted: Docketed Date: December 2, 2020

Allocatur/Miscellaneous Granted: December 2, 2020 Allocatur/Miscellaneous Docket No.: 203 EAL 2020

Allocatur/Miscellaneous Grant Order: AND NOW, this 2nd day of December, 2020, the Petition for Allowance of Appeal is GRANTED. The issue, as stated by petitioner, is:

Did the Superior Court err when it held that the equitable property interest in the trust res of a current vested beneficiary does not establish the beneficiary's automatic standing to raise issues with the Trustees' breach of fiduciary duties to the Trust, but instead a court must evaluate each and every beneficiary's individualized financial loss to determine if it meets some unknown threshold sufficient to meet the "substantial, direct and immediate" test?

Supreme Court of Pennsylvania



Appeal Docket Sheet

Docket Number: 36 EAP 2020

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January 17, 2021

FEE INFORMATION

Fee Dt	Fee Name	Fee Amt	Receipt Dt	Receipt No	Receipt Amt
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INTERMEDIATE APPELLATE COURT INFORMATION

Court Name:	Superior	Docket Number:	3609 EDA 2018
Date of Order:	June 3, 2020	Rearg/Recon Disp Date:	
Judge(s):	Bender, John T. Dubow, Alice B. Colins, James G.	Rearg/Recon Disposition:	
Intermediate Appellate Court Action:	Affirmed/Reversed/Remanded		
Referring Court:			

AGENCY/TRIAL COURT INFORMATION

Court Below:	Philadelphia County Court of Common Pleas		
County:	Philadelphia	Division:	Philadelphia County Orphans' Court
Date of Agency/Trial Court Order:	July 9, 2018		
Docket Number:	No. 1039 ST of 1952		
Judge(s):	Carrafiello, Matthew D.	OTN:	
Order Type:	Order		

ORIGINAL RECORD CONTENT

Original Record Item	Filed Date	Content/Description
Original Record	December 07, 2020	3 Parts

Record Remittal:

BRIEFING SCHEDULE

Appellant	Appellee
Reed, Elizabeth A.	Pennsylvania Office of Attorney General
Brief	Brief
Due: January 26, 2021 Filed:	PNC Bank, N.A.
Reply Brief	Brief
Reproduced Record	Sullivan, Meemie
Due: January 26, 2021 Filed:	Brief
	Trustees of the University of Pennsylvania
	Brief



DOCKET ENTRY

Filed Date	Docket Entry / Representing	Participant Type	Filed By
December 2, 2020	Allocatur Granted		Per Curiam
Comments: AND NOW, this 2nd day of December, 2020, the Petition for Allowance of Appeal is GRANTED. The issue, as stated by petitioner, is: Did the Superior Court err when it held that the equitable property interest in the trust res of a current vested beneficiary does not establish the beneficiary's automatic standing to raise issues with the Trustees' breach of fiduciary duties to the Trust, but instead a court must evaluate each and every beneficiary's individualized financial loss to determine if it meets some unknown threshold sufficient to meet the "substantial, direct and immediate" test?			
December 7, 2020	Superior Court Record Received		Superior Court of Pennsylvania
December 18, 2020	Designation of Contents of Reproduced Record	Appellant	Reed, Elizabeth A.
December 22, 2020	Praecepte to Substitute Pages 3 and 4 of the Designation of Contents of Reproduced Record	Appellant	Reed, Elizabeth A.
January 8, 2021	Application for Extension of Time to File Brief - First Request	Appellant	Reed, Elizabeth A.
January 11, 2021	Order Granting Application for Extension of Time to File Appellant Brief		Wallace, Phoenicia D. W.
Comments: AND NOW, this 11th day of January 2021, Appellant's Unopposed Application for Extension of Time to File Brief is granted to the extent that Appellant is afforded an additional seven (7) days. Appellant's Brief shall be due in the Eastern District filing office on or before January 26, 2021. No further requests for extensions of time will be entertained or granted.			
January 11, 2021	Order Exited		Office of the Prothonotary

CROSS COURT ACTIONS

Docket Number:	108 EDM 2018
Docket Number:	203 EAL 2020
Docket Number:	3609 EDA 2018