PEDERSON LAW OFFICES
A PROFESSIONAL LAW CORPORATION

INCAPACITY TRUST ADMINISTRATION
WELCOME PACKET

WE LOOK FORWARD TO WORKING WITH YOU TO ANSWER YOUR QUESTIONS, ADDRESS YOUR CONCERNS, AND GUIDE YOU THROUGH THE INCAPACITY TRUST ADMINISTRATION PROCESS.

WHETHER YOU ARE A NEW OR EXISTING CLIENT, THIS PACKET WILL PROVIDE INFORMATION ABOUT OUR PROCESS AND HELP YOU PREPARE FOR YOUR ADMINISTRATION CONSULTATION.

IF YOU SHOULD HAVE ANY QUESTIONS PRIOR TO YOUR APPOINTMENT, PLEASE DO NOT HESITATE TO CONTACT OUR OFFICE.

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Estate Planning - Trusts - Probate Law
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www.pedersonlawoffices.com

1. OUR PROCESS

COMPLETE INTAKE QUESTIONNAIRE	• Provide us with details about the incapacitated individual's assets and family circumstances
SCHEDULE A CONSULTATION	• In person at our office, via phone or video conference
INITIAL CONSULTATION *(additional Consults may be needed)*	• Discuss California legal requirements, and any concerns or questions • Determine steps necessary to complete administration
GATHER ADDITIONAL INFORMATION	• Follow up regarding any missing details or decisions to be made
DRAFT LEGAL DOCUMENTS	• Carefully drafted and thoroughly reviewed by our office
DOCUMENT EXECUTION	• Documents delivered as you prefer • Coordinate signing of documents, as required
STATUS OF ADMINISTRATION	• Review administration status
CLOSE ADMINISTRATION	• Return original documents and close file

2. PREPARING FOR YOUR CONSULTATION

ONLINE INTAKE QUESTIONNAIRE

We understand that the intake questionnaire may seem overwhelming. However, completion of this questionnaire is imperative because without a comprehensive overview of the incapacitated individual's assets and any estate planning documents, we cannot properly advise you regarding the next steps of administration.

Therefore, it is best to gather all pertinent information (incapacitated individual's asset information, any existing estate planning documents, and contact information for all parties named in the estate planning documents) prior to scheduling a Consultation.

If you have not already received the link to our online questionnaire, please follow the link below:

- **INCAPACITY TRUST ADMINISTRATION:**
  - Click Here to Complete Incapacity Administration Intake Form

If you would prefer to handwrite your questionnaire, we can mail a paper version to you upon request.

WHAT TO GATHER AND PROVIDE FOR YOUR CONSULTATION

Gathering the following applicable documents pertaining to the incapacitated individual's assets and lack of capacity in advance of your appointment will allow the discussion with your attorney to be more efficient and productive. Unless our office already possesses the following, please provide copies via our online intake portal, by email, or by bringing them with you to your consultation

- **Signed Physician's Declaration(s) regarding the individual's capacity**
- **Existing estate planning documents**
- **Recent account statements**
- **All stock certificates, bonds, or any other securities**
- **All IRA, 401(k), and qualified pension benefit documents, including beneficiary designation forms and plan descriptions**
- **Copies of any partnership agreements, shareholder agreements, operating agreements, buy-sell agreements, and corporate records for any partnership or closely held corporation**

- **All life insurance policies and annuity contracts, including beneficiary designation forms**
- **All non-CA deeds to real property in which the incapacitated individual had any interest and copies of any notes or deeds of trust to which such properties are subject**
- **A list of any known debts, liabilities, pending lawsuits, or other claims of or against the incapacitated individual**
- **Copies of any trust of which the incapacitated individual was a trustee or beneficiary at the time of incapacity**

OTHER INFORMATION TO COLLECT

Although the following information and documents may also be needed, they are not necessary for the initial meeting *(unless applicable and readily available)*:

- A list of all safe deposit boxes on which the incapacitated individual's name appears, by bank and branch, and an inventory of the contents of each
- All leases for all real property on which the incapacitated individual was either the landlord or tenant
- Most recent financial statements and tax returns for any partnership or other closely held business
- Certificates of title ("pink slips") or Registration for all automobiles, recreational vehicles, boats, trailers, motorcycles, airplanes, etc., in which the incapacitated individual had any ownership interest
- A list of tangible personal property items that, individually or as a group or collection, have a fair market value in excess of $5,000 (*e.g.,* jewelry, art, antiques, or coin, stamp, book, gun, or wine collections)
- All deeds of trust, notes, or accounts receivable representing payments owed to the incapacitated individual
- Most recent personal income tax return of the incapacitated individual
- Any other documents that you believe may be important to our understanding of the incapacitated individual's personal and financial affairs

3. HOW MUCH DOES ADMINISTRATION TYPICALLY COST?

CONSULTATIONS, PREPARATION OF DOCUMENTS AND TIMING OF PAYMENT

Incapacity Trust Administration

- **Introductory Meeting:** We can have a quick introductory meeting, at no charge, for new clients so that we may get to know one another and determine if we are able to assist you. Beyond that our time spent on your matter will be billed at the attorney's hourly rate.
- **Consultation(s) & Correspondence:** Time spent reviewing documents to prepare for the consultation, time spent in consultation, and subsequent time spent providing guidance to the Trustee(s), whether via telephone, email, or otherwise, will be billed at the attorney's hourly rate.
- **Preparation of Documents:** We will typically quote a flat fee to prepare documents that we know will be required as a result of the individual's incapacity.
- **Timing of Payment:** Payment in full is collected up front for us to begin drafting the documents.
- **If there is more than one Trustee, it is important that both attend all consultations and participate in all correspondence related to the matter.**

Hourly Rates

Our attorneys' current hourly rates (as of January 2026):

- **Grant S. Pederson:** $600
- **Todd J. Vigneux:** $550
- **Camille M. Aceituno:** $525
- **Russell J. Jokela:** $500

You may learn more about our attorneys on our website at www.pedersonlawoffices.com/our-team.

4. DIRECTIONS TO OUR OFFICE

1) **Exit Westlake Blvd.** from the 101 freeway and then head south. *(If coming from Los Angeles, left turn off the freeway. If coming from Ventura, turn right off the freeway.)*
2) Make a **right turn onto Hampshire Road**.
3) **Turn right into the driveway immediately after Wild Rose Street**. *(Look for building address 850 which is visible from Hampshire Road. Our building, 920, is right behind building 850. If you pass Lakefield Road, you've gone too far.)*
4) Once in the parking lot, continue straight to the top level of the parking structure and look to the right for building 920 *(immediately behind building 850)*.
5) Park near the walkway between buildings 850 and 920.
6) As you proceed through the walkway, we are the first suite on your left, Suite A1 on the 2nd floor in building 920 *(ignore keypad on door, it will be unlocked during business hours)*.