



**PEDERSON LAW OFFICES**  
A PROFESSIONAL LAW CORPORATION

## **TRUST / PROBATE ADMINISTRATION WELCOME PACKET**

**WE LOOK FORWARD TO WORKING WITH YOU TO ANSWER YOUR QUESTIONS, ADDRESS YOUR CONCERNS, AND GUIDE YOU THROUGH THE TRUST / PROBATE 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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# 1. OUR PROCESS

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## COMPLETE INTAKE QUESTIONNAIRE

- Provide us with details about the decedent'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 & COORDINATE DISTRIBUTION

- Review administration status and distribute assets

## CLOSE ADMINISTRATION

- Return original documents and close file

### How long does the process take?

Trust Administration: Generally, 3 - 12 months *(subject to circumstances)*

Probate Administration: Generally, 6 – 18 months *(subject to circumstances)*

## 2. PREPARING FOR YOUR CONSULTATION

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### 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 decedent's assets and any estate planning documents, we cannot properly advise you regarding the administration of the trust or estate.

Therefore, it is best to gather all pertinent information (contact information for all named individuals, decedent's asset information, and existing 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:

- **TRUST ADMIN / PROBATE:**
  - [Click Here to Complete Trust Administration and Probate 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 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

- Existing original estate planning documents
- Recent account statements
- Certified copies of death certificate, if available (minimum of 1, and additional copies for each parcel of real property)
- 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 decedent 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 decedent
- Copies of any trust of which decedent was a trustee or beneficiary at the time of death

## 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 decedent's name appears, by bank and branch, and an inventory of the contents of each
- All leases for all real property on which decedent 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 decedent 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 \$3000 (e.g., jewelry, art, antiques, or coin, stamp, book, gun, or wine collections)
- Copies of all bills for expenses of last illness, such as hospital and doctor bills, and an itemized list of all funeral and related expenses
- All deeds of trust, notes, or accounts receivable representing payments owed to decedent
- Most recent personal income tax return
- Any other documents that you believe may be important to our understanding of the decedent's personal and financial affairs

### 3. HOW MUCH DOES ADMINISTRATION TYPICALLY COST?

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#### CONSULTATIONS, PREPARATION OF DOCUMENTS AND TIMING OF PAYMENT

##### Trust Administration

- **Consultations:** We offer the first half-hour of the consultation at no charge to new clients so that we may get to know one another, review documents, and determine if we are able to assist you. **If there is more than one Trustee, it is important that both attend the consultation.**
- Additional time beyond the first half-hour will be billed at the attorney's hourly rate. If you are an existing client, the consultation will be billed at the attorney's hourly rate.
- We will typically quote you a flat fee to prepare the documents necessary to administer the Trust.
- Payment in full is collected up front for us to begin drafting the documents required to administer the Trust.

##### Hourly Rates

Our attorneys' current hourly rates (as of January 2024):

- |                                   |                                     |
|-----------------------------------|-------------------------------------|
| • <b>Grant S. Pederson:</b> \$575 | • <b>Camille M. Aceituno:</b> \$500 |
| • <b>Todd J. Vigneux:</b> \$525   | • <b>Russell J. Jokela:</b> \$450   |

You may learn more about our attorneys on our website at [www.pedersonlawoffices.com/our-team](http://www.pedersonlawoffices.com/our-team).

##### Probate

- **Consultations:** This initial meeting will allow us to get to know one another, review documents, and determine if we are able to assist you. **If there is more than one Executor, it is important that both attend the consultation.**
- In California, legal fees for a probate administration are set by statute based on the gross value of the estate, and therefore are not open for negotiation.
- An initial deposit will be collected upfront to defray the costs incurred to administer the estate on behalf of the client. Payment of legal fees will be collected at the end of the administration, only after Court approval.

## 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).*

