

ATTORNEY OR PARTY WITHOUT ATTORNEY: STATE BAR NO.: 280213 NAME: Chris Scarcella FIRM NAME: C. S. Scarcella & Associates STREET ADDRESS: 250 W. First St. #244 CITY: Claremont TELEPHONE NO.: (909) 529-3979 E-MAIL ADDRESS: cs@scarcellaw.com ATTORNEY FOR (Name): Wayne Thomas Spiker		DE-111 FOR COURT USE ONLY FILED SUPERIOR COURT OF CALIFORNIA COUNTY OF SAN BERNARDINO PROBATE DEPT. JUN 21 2022 <i>Valerie Goldstein</i> BY: VALERIE GOLDSTEIN, Deputy	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF San Bernardino STREET ADDRESS: 247 W. Third St. MAILING ADDRESS: Same CITY AND ZIP CODE: San Bernardino, CA 92415 BRANCH NAME: Probate division		ESTATE OF (Name): Kathleen Spiker <div style="text-align: right;">DECEDENT</div>	
PETITION FOR <input checked="" type="checkbox"/> Probate of <input checked="" type="checkbox"/> Lost Will and for Letters Testamentary <input type="checkbox"/> Probate of <input type="checkbox"/> Lost Will and for Letters of Administration <input type="checkbox"/> Letters of Administration <input checked="" type="checkbox"/> Letters of Special Administration <input type="checkbox"/> with general powers Authorization to Administer Under the Independent Administration of Estates Act <input type="checkbox"/> with limited authority		CASE NUMBER: 00002200022 PROB02200722 HEARING DATE AND TIME: AUG 01 2022 9:00am DEPT.: S35	

1. Publication will be in (specify name of newspaper): City News

- a. ☐ Publication requested.
 b. ☒ Publication to be arranged.

2. Petitioner (name each):
 Wayne Thomas Spiker

DOUGLAS MANN

NOTICE: This Case is assigned to Dept. **S35**

for all purposes and is subject to CCP 170.6(2)

requests that

- a. ☒ decedent's will and codicils, if any, be admitted to probate.
 b. (Name): Wayne Thomas Spiker be appointed
 (1) ☒ executor
 (2) ☐ administrator with will annexed
 (3) ☐ administrator
 (4) ☐ special administrator ☐ with general powers
 and Letters Issue upon qualification.
 c. ☒ full ☐ limited authority be granted to administer under the Independent Administration of Estates Act.
 d. (1) ☒ bond not be required for the reasons stated in Item 3e.
 (2) ☐ \$ bond be fixed. The bond will be furnished by an admitted surety insurer or as otherwise provided by law. (Specify reasons in Attachment 2 if the amount is different from the maximum required by Prob. Code, § 9482.)
 (3) ☐ \$ in deposits in a blocked account be allowed. Receipts will be filed.
 (Specify institution and location):

3. a. Decedent died on (date): March 25, 2022 at (place): 8560 Monte Vista St., Alta Loma, CA 91701.
 (1) ☒ a resident of the county named above.
 (2) ☐ a nonresident of California and left an estate in the county named above located at (specify location permitting publication in the newspaper named in item 1):

 b. ☐ Decedent was a citizen of a country other than the United States (specify country):
 c. Street address, city, and county of decedent's residence at time of death (specify):
 8560 Monte Vista St., Alta Loma, CA 91701, San Bernardino County

SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BERNARDINO

Wayne Thomas Spiker Re: Estate of

Case No.: PRO992299722

VS.

CERTIFICATE OF ASSIGNMENT

Kathleen Spiker

A civil action or proceeding presented for filing must be accompanied by this Certificate. If the ground is the residence of a party, name and residence shall be stated.

The undersigned declares that the above-entitled matter is filed for proceedings in the San Bernardino District of the Superior Court under Rule 131 and General Order of this court for the checked reason:

- | | |
|---|---|
| <input checked="" type="checkbox"/> General | <input type="checkbox"/> Collection |
| Nature of Action | Ground |
| <input type="checkbox"/> 1. Adoption | Petitioner resides within the district |
| <input type="checkbox"/> 2. Conservator | Petitioner or conservatee resides within the district. |
| <input type="checkbox"/> 3. Contract | Performance in the district is expressly provided for. |
| <input type="checkbox"/> 4. Equity | The cause of action arose within the district. |
| <input type="checkbox"/> 5. Eminent Domain | The property is located within the district. |
| <input type="checkbox"/> 6. Family Law | Plaintiff, defendant, petitioner or respondent resides within the district. |
| <input type="checkbox"/> 7. Guardianship | Petitioner or ward resides within the district or has property within the district. |
| <input type="checkbox"/> 8. Harassment | Plaintiff, defendant, petitioner or respondent resides within the district. |
| <input type="checkbox"/> 9. Mandate | The defendant functions wholly within the district. |
| <input type="checkbox"/> 10. Name Change | The petitioner resides within the district. |
| <input type="checkbox"/> 11. Personal Injury | The injury occurred within the district. |
| <input type="checkbox"/> 12. Personal Property | The property is located within the district. |
| <input checked="" type="checkbox"/> 13. Probate | Decedent resided or resides within or had property within the district. |
| <input type="checkbox"/> 14. Prohibition | The defendant functions wholly within the district. |
| <input type="checkbox"/> 15. Review | The defendant functions wholly within the district. |
| <input type="checkbox"/> 16. Title to Real Property | The property is located within the district. |
| <input type="checkbox"/> 17. Transferred Action | The lower court is located within the district. |
| <input type="checkbox"/> 18. Unlawful Detainer | The property is located within the district. |
| <input type="checkbox"/> 19. Domestic Violence | The petitioner, defendant, plaintiff or respondent resides within the district. |
| <input type="checkbox"/> 20. Other | |
| <input type="checkbox"/> 21. THIS FILING WOULD | NORMALLY FALL WITHIN JURISDICTION OF SUPERIOR COURT |

The address of the accident, performance, party, detention, place of business, or other factor which qualifies this case for filing in the above-designated district is:

✓ Residence 8560 Monte Vista St.
NAME - INDICATE TITLE OR OTHER QUALIFYING FACTOR ADDRESS

Alta Loma CA 91701
CITY STATE ZIP CODE

I declare, under penalty of perjury, that the foregoing is true and correct and that this declaration was executed on June 14, 2022 at Claremont California.



Signature of Attorney/Party

FILED
SUPERIOR COURT OF CALIFORNIA
COUNTY OF SAN BERNARDINO
PROBATE DEPT.

JUN 21 2022

BY V. Goldstein
V. Goldstein, Deputy

ESTATE OF (name):	CASE NUMBER:
DECEDENT	

3. d. **Character and estimated value of the property of the estate** (complete in all cases):

- (1) Personal property: \$717,060.99
- (2) Annual gross income from
- (a) real property: \$ 0.00
- (b) personal property: \$ 0.00
- (3) **Subtotal** (add (1) and (2)): \$ 717,060.99
- (4) Gross fair market value of real property: \$ 0.00
- (5) (Less) Encumbrances: (\$ 0.00)
- (6) Net value of real property: \$ 0.00
- (7) **Total** (add (3) and (6)): \$ 717,060.99

- e. (1) ☒ Will waives bond. ☐ Special administrator is the named executor, and the will waives bond.
- (2) ☐ All beneficiaries are adults and have waived bond, and the will does not require a bond. (Affix waiver as Attachment 3e(2).)
- (3) ☐ All heirs at law are adults and have waived bond. (Affix waiver as Attachment 3e(3).)
- (4) ☐ Sole personal representative is a corporate fiduciary or an exempt government agency.

- f. (1) ☐ Decedent died intestate.
- (2) ☒ Copy of decedent's will dated: 08/13/97 ☐ codicil dated (specify for each):

are affixed as Attachment 3f(2). (Include typed copies of handwritten documents and English translations of foreign-language documents.)

☐ The will and all codicils are self-proving (Prob. Code, § 8220).

- (3) ☒ The original of the will and/or codicil identified above has been lost. (Affix a copy of the lost will or codicil or a written statement of the testamentary words or their substance in Attachment 3f(3), and state reasons in that attachment why the presumption in Prob. Code, § 6124 does not apply.)

g. **Appointment of personal representative** (check all applicable boxes):

- (1) Appointment of executor or administrator with will annexed:
- (a) ☒ Proposed executor is named as executor in the will and consents to act.
- (b) ☐ No executor is named in the will.
- (c) ☐ Proposed personal representative is a nominee of a person entitled to Letters. (Affix nomination as Attachment 3g(1)(c).)
- (d) ☐ Other named executors will not act because of ☐ death ☐ declination ☐ other reasons (specify):

☐ Continued in Attachment 3g(1)(d).

- (2) Appointment of administrator:
- (a) ☐ Petitioner is a person entitled to Letters. (If necessary, explain priority in Attachment 3g(2)(a).)
- (b) ☐ Petitioner is a nominee of a person entitled to Letters. (Affix nomination as Attachment 3g(2)(b).)
- (c) ☐ Petitioner is related to the decedent as (specify):
- (3) ☐ Appointment of special administrator requested. (Specify grounds and requested powers in Attachment 3g(3).)
- (4) ☐ Proposed personal representative would be a successor personal representative.

h. Proposed personal representative is a

- (1) ☒ resident of California.
- (2) ☐ nonresident of California (specify permanent address):

- (3) ☒ resident of the United States.
- (4) ☐ nonresident of the United States.

ESTATE OF (name):

Kathleen Spiker

DECEDENT

CASE NUMBER:

4. ☒ Decedent's will does not preclude administration of this estate under the Independent Administration of Estates Act.
5. a. Decedent was survived by (check items (1) or (2), and (3) or (4), and (5) or (6), and (7) or (8))
- (1) ☒ spouse.
 - (2) ☐ no spouse as follows:
 - (a) ☐ divorced or never married.
 - (b) ☐ spouse deceased.
 - (3) ☐ registered domestic partner.
 - (4) ☒ no registered domestic partner. (See Fam. Code, § 297.5(c); Prob. Code, §§ 37(b), 6401(c), and 6402.)
 - (5) ☒ child as follows:
 - (a) ☒ natural or adopted.
 - (b) ☐ natural adopted by a third party.
 - (6) ☐ no child.
 - (7) ☐ issue of a predeceased child.
 - (8) ☒ no issue of a predeceased child.
- b. Decedent ☐ was ☒ was not survived by a stepchild or foster child or children who would have been adopted by decedent but for a legal barrier. (See Prob. Code, § 6454.)
6. (Complete if decedent was survived by (1) a spouse or registered domestic partner but no issue (only a or b apply), or (2) no spouse, registered domestic partner, or issue. (Check the **first** box that applies):
- a. ☐ Decedent was survived by a parent or parents who are listed in item 8.
 - b. ☐ Decedent was survived by issue of deceased parents, all of whom are listed in item 8.
 - c. ☐ Decedent was survived by a grandparent or grandparents who are listed in item 8.
 - d. ☐ Decedent was survived by issue of grandparents, all of whom are listed in item 8.
 - e. ☐ Decedent was survived by issue of a predeceased spouse, all of whom are listed in item 8.
 - f. ☐ Decedent was survived by next of kin, all of whom are listed in item 8.
 - g. ☐ Decedent was survived by parents of a predeceased spouse or issue of those parents, if both are predeceased, all of whom are listed in item 8.
 - h. ☐ Decedent was survived by no known next of kin.
7. (Complete only if no spouse or issue survived decedent.)
- a. ☐ Decedent had no predeceased spouse.
 - b. ☐ Decedent had a predeceased spouse who
 - (1) ☐ died not more than 15 years before decedent and who owned an interest in **real property** that passed to decedent,
 - (2) ☐ died not more than five years before decedent and who owned **personal property** valued at \$10,000 or more that passed to decedent, (If you checked (1) or (2), check only the **first** box that applies):
 - (a) ☐ Decedent was survived by issue of a predeceased spouse, all of whom are listed in item 8.
 - (b) ☐ Decedent was survived by a parent or parents of the predeceased spouse who are listed in item 8.
 - (c) ☐ Decedent was survived by issue of a parent of the predeceased spouse, all of whom are listed in item 8.
 - (d) ☐ Decedent was survived by next of kin of the decedent, all of whom are listed in item 8.
 - (e) ☐ Decedent was survived by next of kin of the predeceased spouse, all of whom are listed in item 8.
 - (3) ☐ neither (1) nor (2) apply.
8. Listed on the next page are the names, relationships to decedent, ages, and addresses, so far as known to or reasonably ascertainable by petitioner, of (1) all persons mentioned in decedent's will or any codicil, whether living or deceased; (2) all persons named or checked in items 2, 5, 6, and 7; and (3) all beneficiaries of a trust named in decedent's will or any codicil in which the trustee and personal representative are the same person.

ESTATE OF (name):

Kathleen Spiker

DECEDENT

CASE NUMBER:

8. Name and relationship to decedent	Age	Address
Mark Spiker - son	Adult	9153 Kittering Ave., Oak Hills, CA92345
Christopher Spiker - son	Adult	11547 Maple Valley Rd., Victorville CA 92392
Brian Spiker - son	Adult	7175 Jasper St., Alta Loma, CA 91701
Kathleen Backer - daughter	Adult	15164 Honey Pine Ln., Fontana, CA 92336

☐ Continued on Attachment 8.
9. Number of pages attached: 10

Date: May 26, 2022

Chris Scarcella

(TYPE OR PRINT NAME OF ATTORNEY)



(SIGNATURE OF ATTORNEY) *

* (Signatures of all petitioners are also required. All petitioners must sign, but the petition may be verified by any one of them (Prob. Code, §§ 1020, 1021; Cal. Rules of Court, rule 7.103).)

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: May 26, 2022

Wayne Thomas Spiker

(TYPE OR PRINT NAME OF PETITIONER)



(SIGNATURE OF PETITIONER)

(TYPE OR PRINT NAME OF PETITIONER)

(SIGNATURE OF PETITIONER)

Signatures of additional petitioners follow last attachment.

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Attachment (3f(3))

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Copy of the Lost Will

LAST WILL AND TESTAMENT**OF****KATHLEEN SPIKER**

I, **KATHLEEN SPIKER**, a resident of Alta Loma, California, hereby declare this to be my Last Will and Testament, and I expressly revoke all Wills, including codicils, which I have previously made.

ARTICLE ONE

I am married to **WAYNE T. SPIKER** and all references in this Will to "my spouse" are to him. I have four (4) children now living, whose names and dates of birth are:

MARK T. SPIKER, born April 8, 1963

CHRISTOPHER S. SPIKER, born December 26, 1965

BRIAN W. SPIKER, born July 19, 1968

KATHLEEN A. SPIKER, born September 19, 1978

I have no deceased children who died leaving issue. For the purpose of construing the terms of this Will, the term "issue" shall refer to lineal descendants of all degrees, and the terms "child," "children" and "issue" shall include adopted persons.

ARTICLE TWO

I give the entire residue of my estate to the then acting Trustee or Trustees under that trust designated as the **WAYNE T. SPIKER AND KATHLEEN SPIKER REVOCABLE TRUST** dated , 1997, of which I am the Trustor and Trustee. I direct that the residue of my estate shall be added to, administered and distributed as a part of that Trust, according to the terms of that Trust and any amendment made to it prior to my death. To the extent permitted by law, it is not my intent to create a separate trust by this Will or to subject the Trust or the property added to it by this Will to the jurisdiction of the Probate Court.

ARTICLE THREE

If the disposition in Article Two above is inoperative or is invalid for any reason, or if the Trust referred to in Article Two above fails or is revoked, I incorporate herein by reference the terms of said Trust, as executed on this date, without giving effect to any amendments made subsequently, and I bequeath and devise the residue of my estate to the Trustee named in the Trust as Trustee, to be held, administered and distributed as provided in said Trust instrument.

ARTICLE FOUR

I hereby nominate WAYNE T. SPIKER to be the Executor of this Will. In the event WAYNE T. SPIKER is unable or declines to serve as the Executor of this Will, I hereby nominate MARK T. SPIKER to serve as First Alternate Executor.

The Executor shall have full power and authority to carry out the provisions of this Will pursuant to the California Independent Administration of Estates Act, including the power to manage and operate during the probate of my estate any property and any business belonging to my estate.

ARTICLE FIVE

Whenever in this Will it is provided that a beneficiary, including my spouse, must survive me, the requirement of survivorship shall be interpreted to mean that beneficiary must survive me by sixty (60) days.

ARTICLE SIX

Except as otherwise provided in the Trust referred to in Article Two hereof and this Will, I have intentionally and with full knowledge omitted to provide for my heirs. If any person who, if I died intestate, would be entitled to any part of my estate, shall either directly or indirectly, alone or in conjunction with any other person, claim in spite of my Will an intestate share of my estate, I give that person One Dollar (\$1.00) and no more, in lieu of any other share or interest in my estate.

I subscribe my name to this Will this 13 day of August, 1997, at Alta Loma, California.

Kathleen Spiker
KATHLEEN SPIKER

The foregoing instrument, consisting of three (3) pages including the page signed by the Testator, was at the date hereof, by Testator, signed as and declared to be Testator's Will, in the presence of each of us who, at Testator's request and in Testator's presence and in the presence of each other, have subscribed our names as witnesses thereto. Each of us observed the signing of this Will by Testator and by each other subscribing witness and knows that each signature is the true signature of the person whose name was signed.

Each of us is now more than 21 years of age and a competent witness and resides at the address set forth after our name.

We are acquainted with Testator. At this time, Testator is over the age of eighteen (18) years, and to the best of our knowledge Testator is of sound mind and is not acting under duress, menace, fraud, misrepresentation or undue influence.

We declare under penalty of perjury that the foregoing is true and correct.

Sharon W. Jones residing at 8571 Monte Vista St.
Alta Loma, Ca. 91701

Roger Lopez residing at 829 N. Harbor Blvd
Anaheim, CA 92805

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**Affidavit (Explanation) Regarding
California Probate Code §6124**

Affidavit Regarding CA Probate Code §6124

I, Wayne Thomas Spyker, the Petitioner in this matter, state as follows:

I make this declaration of my own personal knowledge, except where stated on information and belief. If called upon to testify in Court on these matters, I could and would do so competently.

CA Probate Code §6124 reads:

If the testator's will was last in the testator's possession, the testator was competent until death, and neither the will nor a duplicate original of the will can be found after the testator's death, it is presumed that the testator destroyed the will with intent to revoke it. This presumption is a presumption affecting the burden of producing evidence.

This statute does not apply because a copy has been found (and is provided to the Court).

The original will of Kathleen Spiker (the "Decedent") was lost after her death. On April 29, 2022, I faxed a copy of it to an attorney probating an estate that the decedent has an interest in, and without knowing the importance of retaining the original, I destroyed it thereafter.

One of the attesting witnesses to the Will, Sharon W. Jones, has provided a declaration confirming that she witnessed the Decedent's Will, remembers the Decedent signing it, and that the signature on copy of the will appears to be her signature.

Despite making diligent efforts, I have been unable to locate the other witnesses to the Will, Roger Lopez (he likely has changed addresses since signing the Will approximately 25 years earlier).

I am the Decedent's widowed husband, and we concurrently created a revocable living trust, alongside pour-over wills on August 13, 1997. The Trust was established for our mutual benefit during our lifetimes, and then for the surviving spouse among us (after our deaths, the Trust estate divides evenly among our children).

1 We were married for 60 years. We have four children together and neither of us had
2 children from any other relationship.

3 The Court has a duty when interpreting a trust instrument to "first ascertain and then, if
4 possible, give effect to the intent of the maker." (*Estate of Cairns* (2010) 188 Cal.App.4th 937,
5 944; see also CA Probate Code §21102, subd. (a). As confirmed by the copy of her will, my
6 wife intended for me upon her death to receive all of her property interests in my capacity as
7 trustee of our trust, and I do not expect any opposition from our children (the only other
8 interested parties in this matter) to the will being admitted.

9 I affirm and/or declare under penalty of perjury under the laws of the State of California
10 that the foregoing is true and correct.

11
12 Dated: May 26, 2022

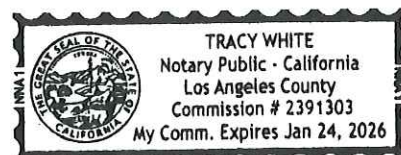
13 Wayne Thomas Spiker
14 WAYNE THOMAS SPIKER,
15 *Petitioner*

16
17 **JURAT**

18 A notary public or other officer completing this certificate verifies only the identity of the individual who signed the
19 document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

20 STATE OF CALIFORNIA
21 COUNTY OF LOS ANGELES
22 SUBSCRIBED AND SWORN TO (or affirmed)
23 before me on May 26, 2022, by WAYNE
24 THOMAS SPIKER, personally known to me or
25 proved to me on the basis of satisfactory evidence
26 to be the person who appeared before me.

27 Tracy White
28 NOTARY PUBLIC



SEAL

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DECLARATION OF SHARON M. JONES

1
2 SUPERIOR COURT OF THE STATE OF CALIFORNIA
3 FOR THE COUNTY OF SAN BERNARDINO- PROBATE DIVISION
4

5
6 DECLARATION OF SHARON M. JONES

7 Re the estate:

8 KATHLEEN SPIKER
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12 I, SHARON M. JONES, declare as follows:

13 1. I make this declaration of my own personal knowledge, except where stated on information
14 and belief. If called upon to testify in Court on these matters, I could and would do so competently.
15

16 2. I am the neighbor of the Petitioner in this matter, and have been since 1967.

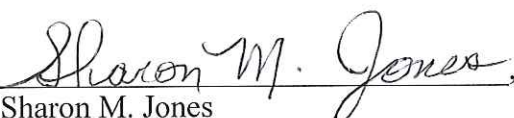
17 3. I was also the neighbor to the Petitioner's wife, the Decedent, until the time of her death in
18 March 2022.

19 4. I recall witnessing the Decedent signing her Will and attesting to her signature.


20 5. I have reviewed the copy of the Will and I am certain that the signature on that document
21 purporting to be mine is in fact my signature.

22 I declare under penalty of perjury under the laws of the State of California that the foregoing is
23 true and correct.

24 Date: May 27, 2022

25

Sharon M. Jones

DE-147

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address) Chris Scarcella (SBN 280213) 250 W. First St. #244 Claremont, CA 91711		FOR COURT USE ONLY FILED SUPERIOR COURT OF CALIFORNIA COUNTY OF SAN BERNARDINO PROBATE DEPT. JUN 21 2022  BY: VALERIE GOLDSTEIN, Deputy
TELEPHONE NO.: (909) 520-3970 E-MAIL ADDRESS (Optional): cs@scarcellaw.com ATTORNEY FOR (Name): Wayne T. Spiker SUPERIOR COURT OF CALIFORNIA, COUNTY OF San Bernardino STREET ADDRESS: 247 W. Third St. MAILING ADDRESS: Same CITY AND ZIP CODE: San Bernardino 91745 BRANCH NAME: Probate Division	FAX NO. (Optional): (971) 795 9845	
ESTATE OF (Name): Kathleen Spiker <div style="text-align: right;">DECEDENT</div>		
DUTIES AND LIABILITIES OF PERSONAL REPRESENTATIVE and Acknowledgment of Receipt		
		CASE NUMBER: 050692200922

DUTIES AND LIABILITIES OF PERSONAL REPRESENTATIVE

When the court appoints you as personal representative of an estate, you become an officer of the court and assume certain duties and obligations. An attorney is best qualified to advise you about these matters. You should understand the following:

1. MANAGING THE ESTATE'S ASSETS

- a. **Prudent Investments**
You must manage the estate assets with the care of a prudent person dealing with someone else's property. This means that you must be cautious and may not make any speculative investments.
- b. **Keep estate assets separate**
You must keep the money and property in this estate separate from anyone else's, including your own. When you open a bank account for the estate, the account name must indicate that it is an estate account and not your personal account. Never deposit estate funds in your personal account or otherwise mix them with your or anyone else's property. Securities in the estate must also be held in a name that shows they are estate property and not your personal property.
- c. **Interest-bearing accounts and other investments**
Except for checking accounts intended for ordinary administration expenses, estate accounts must earn interest. You may deposit estate funds in insured accounts in financial institutions, but you should consult with an attorney before making other kinds of investments.
- d. **Other restrictions**
There are many other restrictions on your authority to deal with estate property. You should not spend any of the estate's money unless you have received permission from the court or have been advised to do so by an attorney. You may reimburse yourself for official court costs paid by you to the county clerk and for the premium on your bond. Without prior order of the court, you may not pay fees to yourself or to your attorney, if you have one. If you do not obtain the court's permission when it is required, you may be removed as personal representative or you may be required to reimburse the estate from your own personal funds, or both. You should consult with an attorney concerning the legal requirements affecting sales, leases, mortgages, and investments of estate property.

2. INVENTORY OF ESTATE PROPERTY

- a. **Locate the estate's property**
You must attempt to locate and take possession of all the decedent's property to be administered in the estate.
- b. **Determine the value of the property**
You must arrange to have a court-appointed referee determine the value of the property unless the appointment is waived by the court. You, rather than the referee, must determine the value of certain "cash items." An attorney can advise you about how to do this.
- c. **File an inventory and appraisal**
Within four months after Letters are first issued to you as personal representative, you must file with the court an inventory and appraisal of all the assets in the estate.

ESTATE OF (Name): ✓	CASE NUMBER: PR0002200022
DECEDENT	

d. File a change of ownership

At the time you file the inventory and appraisal, you must also file a change of ownership statement with the county recorder or assessor in each county where the decedent owned real property at the time of death, as provided in section 400 of the California Revenue and Taxation Code.

3. NOTICE TO CREDITORS

You must mail a notice of administration to each known creditor of the decedent within four months after your appointment as personal representative. If the decedent received Medi-Cal assistance, you must notify the State Director of Health Services within 90 days after appointment.

4. INSURANCE

You should determine that there is appropriate and adequate insurance covering the assets and risks of the estate. Maintain the insurance in force during the entire period of the administration.

5. RECORD KEEPING**a. Keep accounts**

You must keep complete and accurate records of each financial transaction affecting the estate. You will have to prepare an account of all money and property you have received, what you have spent, and the date of each transaction. You must describe in detail what you have left after the payment of expenses.

b. Court review

Your account will be reviewed by the court. Save your receipts because the court may ask to review them. If you do not file your accounts as required, the court will order you to do so. You may be removed as personal representative if you fail to comply.

6. CONSULTING AN ATTORNEY

If you have an attorney, you should cooperate with the attorney at all times. You and your attorney are responsible for completing the estate administration as promptly as possible. When in doubt, contact your attorney.

NOTICE: 1. This statement of duties and liabilities is a summary and is not a complete statement of the law. Your conduct as a personal representative is governed by the law itself and not by this summary.
2. If you fail to perform your duties or to meet the deadlines, the court may reduce your compensation, remove you from office, and impose other sanctions.

ACKNOWLEDGMENT OF RECEIPT

1. I have petitioned the court to be appointed as a personal representative.
2. My address and telephone number are (specify):

8560 Monte Vista St., Alta Loma, CA 91701
Telephone Number: (909) 980-5018

3. I acknowledge that I have received a copy of this statement of the duties and liabilities of the office of personal representative.

Date: May 26, 2022

Wayne Thomas Spiker

(TYPE OR PRINT NAME)

Wayne Thomas Spiker
(SIGNATURE OF PETITIONER)

Date:

(TYPE OR PRINT NAME)

(SIGNATURE OF PETITIONER)

CONFIDENTIAL INFORMATION: If required to do so by local court rule, you must provide your date of birth and driver's license number on supplemental Form DE-147S. (Prob. Code, § 8404(b).)

