

AANESTAD LAW

430 S. Auburn Street
Grass Valley, CA 95945
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INVOICE

Invoice # 1189
Date: 12/09/2024

Jesse Niesen

TA1061

Trust Estate of Kathryn Niesen

Date	Notes	Quantity	Rate	Total
10/07/2024	TCA - Review phone message and email from attorney Pare requesting a conference; reply to Pare's email providing conference availability	0.10	\$350.00	\$0.00
10/07/2024	TCA - Telephone conference with attorney Pare regarding letter received and issues facing the family and her proposal as to how to resolve the situation and move forward collectively	0.40	\$350.00	\$140.00
10/09/2024	TCA - Email Jesse with summary of conversation with attorney Pare and my recommendations for proceeding with the administration and his actions to get on title to the bank account for Kathryn	0.20	\$350.00	\$70.00
10/14/2024	TCA - Telephone consultation with Jesse regarding response to Pare's letter and plans to move forward; TCA will represent him only as a durable power of attorney to assist with getting on title to the Tri Counties account and preparing an accounting, if necessary	1.00	\$350.00	\$350.00
10/14/2024	TCA - Email attorney Pare requesting copy of incapacity letter; review email from attorney Pare with incapacity letter, review incapacity letter; email copy of incapacity letter to Jesse	0.10	\$350.00	\$35.00
10/16/2024	TCA - Receive email from Pare regarding my cancellation of the phone conference and purported refusal to reschedule; discuss statements Pare made with BL; forward copy of Pare's email to Jesse and recommend how to respond and request authority to respond	0.20	\$350.00	\$70.00
10/16/2024	TCA - Prepare letter to Tri Counties advising that Kathryn is incapacitated and that Jesse is appointed as the durable power of attorney	0.20	\$350.00	\$70.00
10/18/2024	TCA - Email Jesse following up on draft letter to Tri Counties; review voicemail from Jesse approving letter with the exception of deleting reference to death certificate; email Jesse stating that I'll remove reference to the death certificate and if Tri Counties needs that they'll let us know	0.20	\$350.00	\$70.00
10/18/2024	TCA - Revise letter to Tri Counties to remove reference to death certificate; also remove signature and instruction paragraph from Jesse	0.10	\$350.00	\$35.00

	since he's unable to sign while traveling to Texas			
10/18/2024	TCA - Telephone call to Tri Counties to obtain email or fax for manager to send the letter to; email letter with attachments to Josh at Tri Counties	0.10	\$350.00	\$35.00
10/18/2024	TCA - Review email response from Josh that designating Jesse as the DPOA has been preliminarily approved, but that he will need an original Certificate of Death and original DPOA document	0.10	\$350.00	\$35.00
10/18/2024	TCA - Additional email to Jesse advising him that Tri Counties has granted initial approval of adding him as the DPOA pending receipt of the original Certificate of Death and original DPOA document and request documents to provide to bank	0.10	\$350.00	\$35.00
10/21/2024	TCA - Email Jesse asking if he needs assistance with getting original Certificate of Death for C. Duane Niesen to give to Tri Counties; review his email asking to check with attorney Pare; email attorney Pare requesting original Certificate of Death for father so Jesse can get on title with Tri Counties	0.10	\$350.00	\$35.00
10/29/2024	TCA - Email attorney Pare following up on original Certificate of Death that she was obtaining from Perry; review response from Pare stating that she has received the death certificate	0.10	\$350.00	\$35.00
10/29/2024	TCA - Email Jesse advising that Pare has received the death certificate and we will pick it up from her office and request original DPOA document	0.10	\$350.00	\$35.00
11/06/2024	BL - Travel to and from Pare's office to retrieve original Certificate of Death for Carl Duane; scan and update file	0.20	\$195.00	\$39.00
11/25/2024	TCA - Review email from Jesse advising that his friend Charlie Day has the original DPOA and will drop it at the office	0.10	\$350.00	\$35.00
11/26/2024	BL - Receive original DPOA document from Charlie Day; scan and update file	0.10	\$195.00	\$19.50
11/26/2024	BL - Deliver original Certificate of Death and DPOA document to Josh at Tri Counties Bank	0.30	\$195.00	\$58.50
12/06/2024	TCA - Email Josh at Tri Counties asking for status of review of original documents to add Jesse as the DPOA on Kathryne's accounts	0.10	\$350.00	\$35.00
12/09/2024	TCA - Review and analyze Jesse's email asking for status of Tri Counties' response and how to protect Jason for accessing the account online, his mother's medical condition, and his plan for further handling of issues; analyze terms of DPOA to determine if Jesse can appoint a co-agent to serve as the DPOA or resign and appoint, prepare response to Jesse's email answering his questions and making recommendations as to how to move forward with Perry and the pending issues	1.10	\$350.00	\$385.00
Line Item Discount Subtotal				-\$35.00
Subtotal				\$1,622.00

Total \$1,622.00

Statement of Account

Outstanding Balance	New Charges	Amount in Trust	Payments Received	Total Amount Outstanding
(\$0.00 + \$1,622.00) - (\$0.00 + \$0.00) =	\$1,622.00			

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
1189	12/09/2024	\$1,622.00	\$0.00	\$1,622.00
Outstanding Balance				\$1,622.00
Amount in Trust				\$0.00
Total Amount Outstanding				\$1,622.00

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