



JONELLE C. BECK

ATTORNEY & COUNSELOR AT LAW

November 5, 2025

Re: Jones Final Estate Planning Documents

Dear Judy:

I hope that this letter finds you doing well. I am in receipt of the changes you made to your estate planning drafts. I have made those corrections and I am sending the final documents for your signature. Please do not return the documents to my office.

Enclosed are instructions for executing the trust with schedule of assets, the wills, the durable powers of attorney for finance and the advance healthcare directives. Please note that the will must NOT be notarized, instead please have it witnessed by two witnesses. Please note that you must have the following documents notarized:

1. the trust;
2. the deed;
3. the certified abstract of the trust;
4. the durable powers of attorney for finance;
5. the advance healthcare directives (optional, you may use witnesses).

Funding the trust: To fund your trust with your real property, please sign and date the "Preliminary Change of Ownership Report." Please mail the following documents to the Monterey County Recorder:

1. Signed & dated "Preliminary Change of Ownership Report;"
2. Notarized trust transfer deed (the county recorder will mail the original back to you for your safe keeping);
3. A check in the amount of \$15.00 made payable to the "Monterey County Clerk-Recorder."

Monterey County Recorder

P.O. Box 29

Salinas, CA 93902

**It is VERY important that you complete this task in a timely manner. If you do not, your property will NOT be held in trust and will therefore be subject to probate.

To fund your trust with your investment accounts, life insurance policies and/or bank accounts, please follow the detailed instructions on the instruction page. If you have any questions regarding this process, please contact the office immediately. Please be sure to provide a notarized copy of the Certified Abstract to your financial advisor.

Please do not return the documents to my office. Please keep several copies of your documents in an easily accessible place so that you will have them in case a financial institution requests a copy.

I have included a copy of your paid invoice for your tax records. Thank you for entrusting me with your estate planning needs. It has been a pleasure working with you and I look forward to assisting you in any future estate planning needs that you may have.

Very truly yours,

Jonelle C. Beck

Enclosures

P.S. Referrals are the lifeblood of my practice! When you refer your family & friends to my firm they will be well taken care of. Thank you.