

**Eric Jones <eric@recovery-compass.org>**

Follow up requested documents for client Eric Jones

1 message

Eric Jones <eric@recovery-compass.org>Wed, Aug 6, 2025 at
8:53 PMTo: Cara Ouellette <cara@theestatelawyers.com>, "Carl L. Jones"
<Carl@theestatelawyers.com>

Cc: Eric Jones <eric@recovery-compass.org>

Dear Carl and Cara,

Thank you for taking the time to meet with me today. It was helpful to discuss the path forward, particularly the Heggstad petition strategy to avoid probate and maintain my sole authority as trustee.

As promised, I'm attaching the documents we discussed during our meeting:

ATTACHED DOCUMENTS:

1. **Death Certificate** - Judy Brakebill Jones (April 4, 2025)
2. **Wells Fargo Notes** - My notes from attempting to access trust accounts at Wells Fargo, where they mentioned needing a "probate referee" before providing account information
3. **May 19 Meeting Witness Notes** - Detailed notes taken by my fiancée Nuha Sayegh at my sisters' request, documenting the meeting at the estate the day after our mother's funeral. This provides important context about early unauthorized actions and pressure tactics
4. **Apple Security Correspondence** - Their response requiring a court order to access my mother's iPhone/iCloud account

for two-factor authentication codes needed for trust administration

5. **May 23 Beneficiary Notice** - The Probate Code §16061.7 notice I sent to all beneficiaries on May 23, 2025
6. **iPhone Demand Letter** - My formal demand to Heidi for the actual iPhone (sent after receiving what I described today as the "fake iPhone"). Note: I'm currently on vacation and cannot access the certified mail receipt showing Heidi signed for this on May 29, but I can provide that upon my return
7. **Heidi/Shay Response Document** - The "transactions and clarification" document my sisters sent in response to my May 23 beneficiary notice, which may provide insight into their position
8. Some other documents I provided other law firms for intake briefing.

Key points from today:

Per our discussion, I understand the immediate priorities are:

- Setting up mail forwarding (doing today)
- Providing these documents (attached)
- Locating my sister in Egypt's address (will check the estate tomorrow)
- Preparing for the Heggstad petition to bring the house into the trust

I also wanted to confirm that you'll be contacting Nicora Law to inform them of your representation, as they called again just minutes before our meeting today. Can you please let me know when you have completed this task please?

Regarding the bankruptcy:

As we discussed, I have the monthly payment obligation (\$150/month for 60 months) but have fulfilled all requirements and my credit has recovered. I appreciate your plan to research whether this affects trustee qualification, though I understand your initial assessment is that it shouldn't be disqualifying since it preceded my becoming trustee.

Please let me know if you need any clarification on these documents or if there's anything else you need from me at this time. I'm available by email and phone as we move forward.

Best regards,

Eric Brakebill Jones
Successor Trustee
The Judy Brakebill Jones 2008 Revocable Trust
(530) 219-2364
eric@recovery-compass.org

12 attachments



Judy Lee Brakebill Death Certificate.jpg
3509K

Witness Declaration May 19.pdf
115K

Wells Fargo Trust Asset Marshaling Notes.pdf
129K

Apple Security Response regarding decoy iPhone - Your Apple case 102630202132.pdf

186K

Trust Administration Notification - Judy Brakebill

 **Jones.pdf**

309K

Recovery Compass Mail - Judy Brakebill Jones 2008

 **Revocable Trust - Unauthorized Asset Transaction.pdf**

239K

iPhone Return Demand Letter May 24.pdf

 169K

Contact Details .pdf

 75K

Legal Strategy Memorandum Judy Jones Trust

 **Dispute.pdf**

60K

Strategic Brief Judy Jones Trust Litigation.pdf

 49K

Judy Jones Estate Diagnostic.pdf

 65K

Transactions and Clarifications by Heidi and Shay.pdf

 232K