

My Mom's Trust and Will

5 messages

Heidi Blanchard <msheidiblanchard@gmail.com>
To: attorneyjcbeck@comcast.net
Cc: Eric Jones <brakebill@gmail.com>

Mon, Apr 7, 2025 at 4:25 PM

Hello,

My dear Mom, Judy Lee Jones passed away on Friday. We are grieving and wanting to make sure that we carry out my Mom's wishes.

I see the paperwork for my Mom's trust says that you are the attorney and counselor at law. My name is Heidi Blanchard, previously Heidi Jones.

I tried calling the number that she has for you from Stockton and it doesn't seem to be in service. Can you please get a hold of me so that I can get the needed information?

My phone number is 530 513 9710

Thank you,
Heidi Blanchard

Eric Jones <brakebill@gmail.com>
To: "jcbecklaw@gmail.com" <jcbecklaw@gmail.com>
Cc: Heidi Blanchard <msheidiblanchard@gmail.com>

Mon, Apr 7, 2025 at 6:26 PM

Dear Ms. Beck / J.C. Beck Law Office,

My name is Eric Jones, son of Judy Lee Jones. I just left a voicemail moments ago regarding my mother, who passed away on April 4th, 2025.

As mentioned, J.C. Beck Law is listed as the attorney on trust paperwork we have from approximately 2008 for Judy Lee Jones. My sister, Heidi Blanchard, had previously attempted contact using older information which appeared to be out of date.

I am writing to follow up on my voicemail and confirm if your office did indeed handle estate planning for Judy Lee Jones and if you are the correct point of contact.

If so, we urgently need to obtain copies of her most current and complete estate planning documents, including the trust and any amendments.

Please let me know the best procedure to request these documents and what authorization or identification you require from me as her son and likely Successor Trustee (pending review of the documents). My sister, Heidi Blanchard, will also require copies, and I can provide her contact information or she can be copied on correspondence.

You can reach me directly at **530-219-2364** (call or text) or reply to this email or my sister who is copied as well.

Thank you for your time and assistance during this difficult period.

Sincerely,

Eric Jones

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Jonelle Beck <jcbecklaw@gmail.com>
To: Eric Jones <brakebill@gmail.com>, Heidi Blanchard <msheidiblanchard@gmail.com>

Tue, Apr 8, 2025 at 11:06 AM

Dear Eric, Heidi and Gretchen,
Thank you for your voicemail and emails. I am very sad to hear about your mom's passing. She was a lovely lady and a cherished client for many years. I apologize I didn't get Heidi's email since that address is no longer used. I tried calling Eric a few minutes ago and there was no answer. I am pleased to say that your mom was a very organized woman and she did provide me with executed copies of her estate planning documents, many clients do not follow through and that creates a hardship for their loved-ones.

I've moved copies of your mom's documents into a DropBox folder that can be accessed by copying this link (<https://www.dropbox.com/scl/fo/srlka5zt9s0nroq0zdqb0/ADwlw7Sp0ADLTPddemzpcSI?rlkey=3d5hg1jgys2sg0x15lrdm56p&st=isqm56d3&dl=0>) into your browser.

You'll see that Eric is the successor trustee of mom's trust and will oversee any assets moved into trust - they are listed on Schedule A. Both Eric and Heidi are joint executors of mom's will and will oversee her burial as well as her personal items. With Larry passing first, you'll see that you three kids will share equally in mom's estate. I am curious to hear what happened with Larry's kids, they gave your mom such a hard time that I had to get her a litigation attorney to help.

Lastly, please note that I have moved to Tennessee and I am on Central time, two hours ahead, so the best way to reach me is via email. Please let me know if you have any questions and we can go from there.

Regards,



Law Office of Jonelle C. Beck
California State Bar #208760
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Heidi Blanchard <msheidiblanchard@gmail.com>
To: Jonelle Beck <jcbecklaw@gmail.com>
Cc: Eric Jones <brakebill@gmail.com>

Tue, Apr 8, 2025 at 2:18 PM

Thank you Jonelle,
Yes my Mom was an incredibly special person and I am heartbroken. I can't picture life without her.
Luckily my Mom patched things up with one of Larry's daughters because my Mom had an incredible ability to see the best in everyone and forgive. Thank you for trying to help protect her through that.

Jonelle, my brother is very diligently trying to graduate his Masters program in LA right now. I see that I am the alternate trustee and right now and I am the one at her house making many of the financial phone calls to order death certificates, stop social security, figure out her current bills including mortgage, credit cards etc and also alerting her assets like life insurance of her passing so that Eric can focus on school. Is there something that he can sign so that I can do all of that or is that not even necessary since I am an alternate trustee?

I have always known that my Mom wanted everything equal between us kids and I know none of us will dispute or argue that in any way.

Thank you, Heidi Blanchard

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Jonelle Beck <jcbecklaw@gmail.com>
To: Heidi Blanchard <msheidiblanchard@gmail.com>, Eric Jones <brakebill@gmail.com>

Wed, Apr 9, 2025 at 1:09 PM

Hello Heidi,
My heart goes out to you over the loss of your mom, I lost my mom when I was young, but it hurts at any age. You are correct that you are the successor trustee of the trust. I shared with Eric yesterday that from what I can tell from the information your mom provided in Schedule A (which I sent with her documents) is that the house should be held in trust, but the other accounts and policies listed you and your siblings as beneficiaries. This is good news for you since you have the ability to follow-up. As a beneficiary you have the legal authority to contact those financial institutions. I suggest you wait until the death certificates are available to you because that will be the first item they ask for. I recommend you order 12 death certificates.

As co-executor with Eric of your mom's will, you have the authority to make your mom's burial arrangements, manage/inventory/disperse your mom's personal belongings, follow up on social security and pay bills. If Eric doesn't want to act as the trustee with regard to handling the house then he can decline to act (simple form) and you can assume the role as alternate successor trustee of the trust (another simple form).

Please let me know how you both decide to handle things and if you need my assistance we can coordinate a representation agreement between the three of us for help with administration.

Regards,



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