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Electronically FILED by  
Superior Court of the State of California,  
County of San Francisco  
December 12, 2024 8:00 AM  
David W. Slayton,  
Executive Officer/Clerk of Court,  
By B. Rodriguez, Deputy Clerk

**SUPERIOR COURT OF THE STATE OF CALIFORNIA  
FOR THE COUNTY OF SAN FRANCISCO**

THE SMITH FAMILY TRUST                      Case No.: TEST-2024-001

**THIRD ACCOUNT CURRENT AND  
REPORT OF TRUSTEE; FOR  
ALLOWANCE OF FEES TO ATTORNEY  
;PETITION TO INCREASE BOND**

**DATE: 12/15/2024 10:00 AM  
TIME:  
DEPT: 3A**

1. Petitioner Jane Smith, Trustee of the Robert Smith Revocable Trust, file this THIRD Account Current, and state as follows:
2. Appointment and background:  
Petitioner is the Trustee of the Robert Smith Revocable Trust, pursuant to Order of the above-entitled Court, dated January 1, 2023.

3. Period of Account

This Account and Report covers the period from 01/01/2023 until 12/31/2024.

4. Summary of Account and Supporting Schedules.

The Trustor resides at 456 Oak Avenue, San Francisco, CA 94115.

Trustor is a recipient of Veteran's benefits. Notice to the Veteran's Administration is required.

Trustor is not a patient or on leave of absence from a state hospital. No notice to the State Department of Developmental Services is required.

5. Additional Probate Code Accounting Requirements:

The following information is provided to satisfy specific Probate Code provisions:

A. Probate Code Section 1063

Subsection (a): Schedule E of Exhibit A sets forth the fair market value of trust assets on hand as of the beginning and as of the end of the accounting periods. Subsection (b): There were no purchases or other changes in the form of assets occurring during the period of the account, requiring a schedule of same.

Subsection (c): An allocation of receipts and disbursements between principal and income in any case where an estate of a decedent or trust will be distributed to an income beneficiary is not applicable.

Subsection ( d ): There is no specifically devised property in the trustee's possession, therefore, no separate schedule accounting for income, disbursements and proceeds of sale is required.

Subsection (e): Because no interest is to be paid (under estate administration sections), no schedule showing the calculation of interest is required.

7. Attorney's Services and Fees:

During the period of this account and in the course of the management and administration of the estate, it was necessary for Petitioner to employ the Smith Legal Group, as her attorney of record. John Smith, Esq. was paid \$5,000.00 and filed a declaration to request approval of her fees.

11. Bond

Petitioner is bonded herein in the amount of \$2,000,000.00 which bond is not sufficient. Bond shall be increased to \$2,500,000.00

WHEREFORE, Petitioners pray for an order of this Court as follows:

1. That this THIRD ACCOUNT CURRENT AND REPORT OF TRUSTEE, FOR

ALLOWANCE OF FEES TO ATTORNEY FOR TRUSTEE, for the period from 01/01/2023 until 12/31/2024 be settled, allowed, and approved as filed:

2. That all of the acts of the Petitioner as Trustee of the

Robert Smith Revocable Trust, be confirmed and approved.

3. Attorney fees in the amount of \$5,000.00 paid by the Petitioner to be approved.

4. For such other orders as the Court deems proper.

December 12, 2024

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John Smith, Esq.

December 12, 2024.

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Jane Smith

# VERIFICATION

I, Jane Smith, am the petitioner and Trustee in the above-entitled proceeding. have read the foregoing petition and know its contents. I declare that the contents are true of my own knowledge, except as to those matters which are stated on information and belief. As to those matters, I believe them to be true.

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

Dated; December 12, 2024

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Jane Smith