

ATTORNEY OR PARTY WITHOUT ATTORNEY (<i>Name & Address</i>): TELEPHONE NO.: E-MAIL ADDRESS (Optional): ATTORNEY FOR (<i>Name</i>): _____ BAR NO.: _____	FOR COURT USE ONLY
SUPERIOR COURT OF CALIFORNIA, COUNTY OF ORANGE COSTA MESA JUSTICE COMPLEX: 3390 Harbor Blvd, Costa Mesa, CA 92626	
CASE NAME:	
SETTLEMENT CONFERENCE STATEMENT (PROBATE)	CASE NUMBER:
Instructions: All applicable boxes must be checked, and the specified information must be provided.	

1. Type of Matter : Trust Other: _____

Conservatorship

Decedent's Estate/Probate

2. Please outline the facts in support of your position in this matter. If applicable, please include any relevant family relationship information, property ownership information or other supporting information or documentation:

3. Are you alleging that the trustee/conservator/personal representative breached their fiduciary duty? If so, please specify the alleged action(s) or omission(s) that form the basis for your claim.

4. What is the current value of the estate/trust/conservatorship assets, if known?

- a. Has an Inventory & Appraisal been filed in this matter? If so, please attach a copy.
- b. Has an accounting been filed by the trustee/conservator/personal representative? If so, please attach a copy.

5. Are you seeking surcharge against a trustee/conservator/personal representative? If so, please provide a breakdown itemizing the amount of surcharge requested and the facts/authority to support the request.

6. Would you agree to the appointment of a private professional fiduciary as trustee/conservator/ personal representative?

Yes - Who would you recommend? _____

No

7. Are you seeking to recover attorney fees and/or costs incurred in this matter? If so, please list the fees and/or costs incurred to date and the legal authority in support of your ability to recover the requested fees/costs.

8. Have the parties engaged in any prior settlement negotiations? If so, what was each side's most recent proposal?

9. Are there any other issues or concerns that you believe should be addressed at the settlement conference?

10. Please list any additional documents or evidence that you intend to present at the settlement conference.

PURSUANT TO CALIFORNIA RULE OF COURT, RULE 3.1380(c), YOU MUST FILE THIS DOCUMENT NO LATER THAN FIVE COURT DAYS BEFORE THE MANDATORY SETTLEMENT CONFERENCE DATE.

By signing below, I certify that the information provided in this form is accurate and complete to the best of my knowledge.

Date: _____

(type or print name)

(signature of party or attorney)

(type or print name)

(signature of party or attorney)