

**SUBMITTAL TO THE BOARD OF SUPERVISORS  
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA**



**FROM:** Don Kent, Treasurer/Tax Collector

**SUBMITTAL DATE:**  
AUG 02 2010

**SUBJECT:** Recommendation for Distribution of Excess Proceeds for Tax Sale No. 179, Item 66.  
Last assessed to: The Bowles Living Trust Dated 9/10/93, Virginia M. Bowles, Trustor and Trustee.

**RECOMMENDED MOTION:** That the Board of Supervisors:

- 1) Approve the claim from Global Discoveries, Ltd., assignee for Virginia M. Bowles, Trustee of the Bowles Living Trust Dated 9/10/93, last assessee for payment of excess proceeds resulting from the Tax Collector's public auction sale associated with parcel 366091020-3;
- 2) Authorize and direct the Auditor-Controller to issue a warrant to Global Discoveries, Ltd., assignee for Virginia M. Bowles, Trustee of the Bowles Living Trust Dated 9/10/93 in the amount of \$11,488.01, no sooner than ninety days from the date of this order, unless pursuant to the California Revenue and Taxation Code Section 4675, an appeal has been filed in Superior Court.

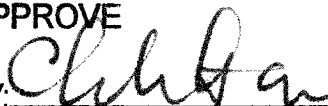
**BACKGROUND:** (Continued on page two)

  
\_\_\_\_\_  
Don Kent, Treasurer-Tax Collector

<b>FINANCIAL DATA</b>	Current F.Y. Total Cost:	\$11,488.01	In Current Year Budget:	NO
	Current F.Y. Net County Cost:	\$0	Budget Adjustment:	N/A
	Annual Net County Cost:	\$0	For Fiscal Year:	2010-11

<b>SOURCE OF FUNDS:</b> Fund 65595 Excess Proceeds from Tax Sale	<b>Positions To Be Deleted Per A-30</b>	<input type="checkbox"/>
	<b>Requires 4/5 Vote</b>	<input type="checkbox"/>

**C.E.O. RECOMMENDATION:**

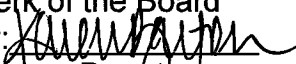
**APPROVE**  
BY:   
Christopher M. Hans

**County Executive Office Signature**

**MINUTES OF THE BOARD OF SUPERVISORS**

On motion of Supervisor Ashley, seconded by Supervisor Buster and duly carried by unanimous vote, IT WAS ORDERED that the above matter is approved as recommended.

Ayes: Buster, Tavaglione, Stone, Benoit and Ashley  
Nays: None  
Absent: None  
Date: September 14, 2010  
xc: Treasurer, Auditor

Kecia Harper-Ihem  
Clerk of the Board  
By:   
Deputy

**9.69**

**Prev. Agn. Ref.:** ATTACHMENTS FILED WITH THE CLERK OF THE BOARD | **District:** 1 | **Agenda Number:**

FORM APPROVED COUNTY COUNSEL  
BY: Dale A. Gardner 8/2/10  
DATE: 8/2/10  
Departmental Concurrence

Policy  Policy   
Consent  Consent

Dept Recomm.:  
Per Exec. Ofc.:

**BOARD OF SUPERVISORS**

Form 11:

Page 2

**BACKGROUND:** (Continued)

In accordance with Section 3691 et seq. of the California Revenue and Taxation Code, and with prior approval of the Board of Supervisors, the Tax Collector conducted the March 17, 2008 public auction sale. The deed conveying title to the purchasers at the auction was recorded May 12, 2008. Further, as required by Section 4676 of the California Revenue and Taxation Code, notice of the right to claim excess proceeds was given on June 9, 2008, to parties of interest as defined in Section 4675 of said code. Parties of interest have been determined by an examination of lot book reports as well as Assessor's and Recorder's records, and various research methods were used to obtain current mailing addresses for these parties of interest.

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The Treasurer-Tax Collector has received one claim for excess proceeds:

- 1) Claim from Global Discoveries, Ltd., assignee for Virginia M. Bowles, Trustee of the Bowles Living Trust Dated 9/10/93 based on an Assignment of Right to Collect Excess Proceeds dated July 10, 2008, an Individual Quitclaim Deed recorded December 10, 1993 as Instrument No. 492030 and an Amendment to the Bowles Living Trust Dated 9/10/93.

Pursuant to Section 4675 (a) & (b) of the California Revenue and Taxation Code, it is the recommendation of this office that Global Discoveries, Ltd., assignee for Virginia M. Bowles, Trustee of the Bowles Living Trust Dated 9/10/93 be awarded excess proceeds in the amount of \$11,488.01. Supporting documentation has been provided. The Tax Collector requests approval of the above recommended motion.

**CLAIM SUMMARY**

To: Riverside County Treasurer and Tax Collector

Assessors Parcel Number: 366-091-020-3  
Last Assessee: BOWLES VIRGINIA M  
Sale Date: 3/17/2008  
Tax Sale Number: TC179  
Item Number: 66  
Deadline Date: 5/12/2009

RECEIVED  
08 AUG -9 AM 7:39  
RIVERSIDE COUNTY  
TREASURER/TAX COLLECTOR

Dear Treasurer/Tax Collector:

1. Claimant(s): Global Discoveries, Ltd.

The following proof of claim(s) for excess proceeds and documents are attached:

1. Quitclaim Deed granting interest to The Bowles Living Trust Dated 9/10/1993 as Instrument #00492030, Recorded 12/10/1993.
2. Certification of Trustee Under Trust
3. Assignment of Excess Proceeds signed by Virginia M. Bowles, Trustee of the Bowles Living Trust Dated 9-10-93
4. Claim Form(s) signed by Global Discoveries

Upon approval, claimant(s) request that the Treasurer and Tax Collector issue its warrant(s) as follows:

- One warrant in the amount of \$11,488.01 or 100% of the claimant's share of the excess proceeds made payable to Global Discoveries, Ltd. and mailed to P.O. Box 1748, Modesto, California 95353-1748.

Please address questions regarding the attached claim(s) to Jed Byerly, Chief Operating Officer, at (209) 593-3913, or e-mail to [jed@globaldiscoveries.com](mailto:jed@globaldiscoveries.com).

The Client(s) and the staff of Global Discoveries, Ltd., thank you in advance for your timely review and approval of the attached claim(s).

AND WHEN RECORDED  
 Name: Virginia M. Bowles  
 Street Address: 21580 Victorian Lane  
 City: Lake Elsinore, CA 92530  
 State: CA

MAIL TAX STATEMENTS TO  
 Name: Same As Above  
 Street Address:  
 City:  
 State:

RECEIVED FOR RECORD  
 AT 8:00 O'CLOCK  
 DEC 10 1993  
 ALI & SHERIDAN  
 COUNTY CLERK  
 RIVERSIDE COUNTY, CALIFORNIA

SPACE ABOVE THIS LINE FOR RECORDER'S USE

APN#366091020-3 **Individual Quitclaim Deed**

The undersigned grantor(s) declare(s): This conveyance transfers the grantor's interest into a Revocable Living Trust R & T 11911.  
 There is no consideration for this transfer and is excluded from reappraisal under Proposition 13, i.e., Calif Const 13 A Section 1, et seq.

Virginia M. Bowles  
 hereby REMISES, RELEASES AND QUITCLAIMS to The Bowles Living Trust Dated 9-1-93  
 Virginia M. Bowles  
 Trustor and Trustee

the following described real property in the City of Lake Elsinore, County of Riverside  
 State of California

Por of Lot 9 Blk 5 MB 013/010 Sedco Tr 8

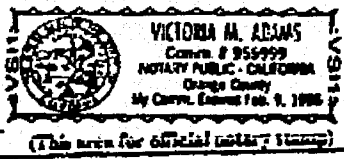
Dated: 11-18-93  
 Virginia M. Bowles  
 Virginia M. Bowles

STATE OF CALIFORNIA )  
 COUNTY OF Riverside )

On 11-18-93 before me, Victoria M Adams  
 personally appeared Jason Fabre VIRGINIA M. BOWLES

personally known to me (or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) have subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their individual capacity(ies), and that by his/her/their signature(s) on the instrument the person(s) or the entity upon behalf of which the person(s) acted, executed the instrument.

WITNESS my hand and official seal.  
 Signature: Victoria M. Adams



RECORDED  
 12 10 93

THIS RECORD IS COPYRIGHTED 1993 BY SECURITY UNION TITLE INSURANCE COMPANY.

**CERTIFICATION OF TRUSTEES UNDER TRUST**  
**(California Probate Code Section 18100.5)**

I (we), Virginia M. Bowles, Trustee of the Bowles Living Trust Dated 9-10-93, being of legal age, declares under penalty of perjury:

1. Declarant(s) certify the existence of the following described Trust and state that he/she/they are all of the current trustees:

Name of Trust: The Bowles Living Trust  
Date of Trust: September 10, 1993  
Trustor(s)/Settlor(s): Virginia M. Bowles  
Original Trustee(s): Virginia M. Bowles  
Trust Identification, Social Security or Employer Identification: 460-12-7901

2. Declarant(s) state that the Trust is in full force and effect and has not been revoked, terminated or otherwise amended in any manner which would cause the representations in this Certification to be incorrect. The name(s) of all persons who have any power to revoke the trust are: Virginia M. Bowles

3. Declarant(s) state the following named trustee(s) is/are full empowered to act for said Trust and is/are properly exercising his/her/their authority under said Trust in negotiating for, contract for and executing the document(s) attached hereto, and that no trustee(s) other than the following named trustees are necessary under the Trust to sign said document(s):

Trustees authorized to sign: Virginia M. Bowles  
Nature of document: Assignment of Right to Collect Excess Proceeds  
Date of document: 7/10/08

4. Declarant(s) state that to the best of their knowledge, there are no claims, challenges of any kind or cause of action alleged, contesting or questioning the validity of the Trust or the trustee's authority to act for the Trust.

5. This Declaration is prepared and executed pursuant to California Probate Code Section 18100.5.

Signed under penalty of perjury, this 10 day of July, 2008.

Virginia M Bowles

Signature

Name: Virginia M. Bowles

Address: \_\_\_\_\_

City, State, Zip \_\_\_\_\_

**CERTIFICATE OF ACKNOWLEDGEMENT OF NOTARY PUBLIC**

State of California

County of San Bernardino

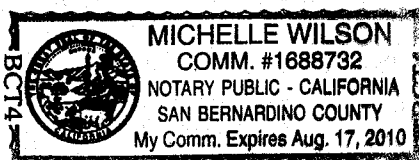
On July 10, 2008 before me, Michelle Wilson, Notary Public personally appeared \_\_\_\_\_  
(Date) (here insert name and title of the officer)

Virginia M. Bowles, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Michelle Wilson (seal)  
Signature of Notary Public



ASSIGNMENT OF RIGHT TO COLLECT EXCESS PROCEEDS

To expedite processing of this claim, we would strongly suggest you use this form. For this form to be valid it must be completed in its entirety and documentation establishing the assignor as a "party of interest" must be provided at the time this document is filed with the Treasurer-Tax Collector. PLEASE SEE REVERSE SIDE OF THIS DOCUMENT FOR FURTHER INSTRUCTIONS.

As a party of interest (defined in Section 4675 of the California Revenue and Taxation Code), I, the undersigned, do hereby assign to GLOBAL DISCOVERIES, LTD. my right to apply for and collect the excess proceeds which you are holding and to which I am entitled from the sale of assessment number 366-091-020-3, Tax Sale Number, Item 66 sold at public auction on 3/17/2008. I understand that the total of excess proceeds available for refund is \$ 11,977.00+/-, and that I AM GIVING UP MY RIGHT TO FILE A CLAIM FOR THEM. FOR VALUABLE CONSIDERATION RECEIVED I HAVE SOLD THIS RIGHT OF COLLECTION (assignment) TO THE ASSIGNEE. I certify under penalty of perjury that I have disclosed to the assignee all facts of which I am aware relating to the value of this right I am assigning.

Virginia M. Bowles 07-10-08  
(Signature of Party of Interest/Assignor) (Date)

Virginia M. Bowles, Trustee of the Bowles Living Trust  
Dated 9-10-93  
(Name Printed)

Tax ID/SS#

5057 Bramble Court  
(Address)

Alta Loma, CA 91737  
(City/State/Zip)

STATE OF CALIFORNIA )  
COUNTY OF San Bernardino )ss.

(Area Code/Telephone Number)

On July 10, 2008, before me, the undersigned, a Notary Public in and for said State, personally appeared who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to within instrument and acknowledged to me that he/she/they executed the same. I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

see attached certificate

(Signature of Notary)

(This area for official seal)

I, the undersigned, certify under penalty of perjury that I have disclosed to the party of interest (assignor), pursuant to Section 4675 of the California Revenue and Taxation Code, all facts of which I am aware relating to the value of the right he is assigning, that I have disclosed to him the full amount of excess proceeds available, and that I HAVE ADVISED HIM OF HIS RIGHT TO FILE A CLAIM ON HIS OWN WITHOUT ASSIGNING THAT RIGHT.

Jed Byerly  
(Signature of Assignee)

Jed Byerly, Chief Operating Officer  
(Name Printed)

Tax ID/SS# 77-0558969

Global Discoveries, Ltd.  
(Address)

STATE OF CALIFORNIA )  
COUNTY OF Stanislaus )

P.O. Box 1748  
Modesto, California 95353-1748  
(City/State/Zip)

Phone: (209) 593-3913

On, before me, the undersigned, a Notary Public in and for said State, personally appeared \*\*\*Jed Byerly\*\*\* who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to within instrument and acknowledged to me that he/she/they executed the same. I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

(Signature of Notary)

(This area for official seal)

**ACKNOWLEDGMENT**

State of California  
County of San Bernardino

On July 10, 2008 before me, Michelle Wilson, Notary Public  
(here insert name and title of the officer)

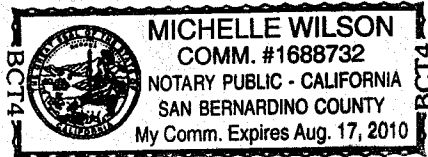
personally appeared Virginia M. Bowles

\_\_\_\_\_

personally known to me (or proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

WITNESS my hand and official seal.

Signature Michelle Wilson



(Seal)

**CLAIM FOR EXCESS PROCEEDS FROM THE SALE OF TAX DEFAULTED PROPERTY**

To: Riverside County Treasurer and Tax Collector

Assessor's Parcel No: 366-091-020-3  
Tax Sale Number: TC179  
Item Number: 66  
Date of Sale: 3/17/2008

The undersigned claimant, Global Discoveries, Ltd., claims \$11,488.01+/- or 100% of the claimant's share of the actual amount of excess proceeds from the sale of the property referenced above.

Global Discoveries, Ltd., claims its status as a party of interest pursuant to Section 4675 of the California Revenue and Taxation Code based upon the attached documentation:

Please refer to Claim Summary and attached Documents

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

Executed this 22nd day of July, 2008 at Modesto, California.

By: [Signature]  
Jed Byerly, Chief Operating Officer  
Global Discoveries, Ltd. Tax ID # 77-0558969  
P.O. Box 1748  
Modesto, CA 95353-1748  
(209) 593-3913

**CERTIFICATE OF ACKNOWLEDGEMENT OF NOTARY PUBLIC**

State of California )

County of Stanislaus )

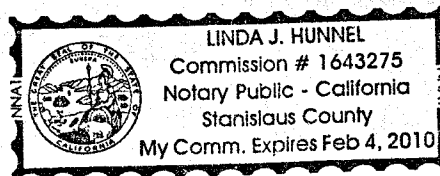
On July 22, 2008 before me, Linda J. Hunnel, Notary Public, personally appeared  
(Date) (here insert name and title of the officer)  
Jed Byerly, who proved to

me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies); and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

[Signature] (seal)  
Signature of Notary Public





## Cindy Shephard

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**From:** Linda Hunnel  
**Sent:** Thursday, April 01, 2010 3:15 PM  
**To:** Cindy Shephard  
**Subject:** FW: EP179 Item66

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**From:** Taylor, Desiree [mailto:DDTaylor@co.riverside.ca.us]  
**Sent:** Thursday, April 01, 2010 3:14 PM  
**To:** Amy Elmer; Linda Hunnel  
**Subject:** EP179 Item66

Hello Ladies,

I am going to need the following documents to complete your claim:

1. A copy of The Bowles Living Trust Dated 9/10/93

All documentation should be received no later than May 3, 2010. If you have any questions please contact me at the number listed below.

Thank you,

## Desiree D. Taylor

County of Riverside Treasurer-Tax Collector  
Tax Enforcement Unit  
951-955-3842 (phone)  
951-955-3990 (fax)  
Mail Stop #1110  
[ddtaylor@co.riverside.ca.us](mailto:ddtaylor@co.riverside.ca.us)  
<http://www.countytreasurer.org>

April 5, 2010

VIA CERTIFIED MAIL

Desiree Taylor  
Treasurer & Tax Collector  
RIVERSIDE COUNTY  
4080 Lemon St. 4th Floor  
Riverside, CA 92502

APN: 366-091-020-3  
TC179 Item 66

Dear Ms. Taylor:

Per your request, enclosed, please find the following documentation to support our claim for the above referenced parcel:

- *Copy of the First Amendment to the Bowles Living Trust dated 9/10/93.*

The enclosed information should assist in perfecting our claim. If there is anything further that you may need, please contact me at (209) 593-3917 or (800) 710-1703. Thank you for your time and patience.

Sincerely,



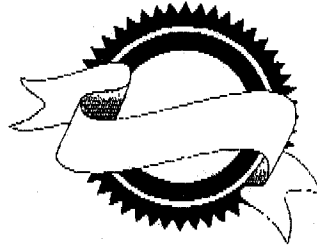
Amy Elmer  
Manager of Claims Processing

Enclosure

9847/cs

**Certified Receipt # 7009 3410 0001 7917 5152**

RECEIVED  
2010 APR 20 PM 12:17  
RIVERSIDE COUNTY  
TREAS - TAX COLLECTOR



# *Estate Planning Portfolio*

*FOR*

**VIRGINIA M. BOWLES**  
**21580 VICTORIAN LANE, WILDOMAR, CALIFORNIA 92595**

## TRUST PARTICULARS

**Settlor(s):** Virginia M. Bowles

**Address:** 21580 Victorian Lane  
Lake Elsinore, CA 92530

**County:** Riverside

**Trust Name:** THE BOWLES LIVING TRUST

**Date Established:** September 10, 1993

**Type of Trust:** Probate Avoidance Trust

**Initial Trustee(s):** Virginia M. Bowles

**Social Security No:** [REDACTED]

**Representative:** Joe Gehl

1

**FIRST AMENDMENT  
TO THE BOWLES LIVING TRUST,  
DATED  
SEPTEMBER 10, 1993**

Pursuant to the right to the undersigned as Settlor, under **THE BOWLES LIVING TRUST, DATED SEPTEMBER 10, 1993**, the undersigned hereby amends said Trust in the following particulars:

1. All references to "ASTOR HAYES" shall mean and refer to "ASTER HAYES".

2. **ARTICLE IX. DISTRIBUTIONS TO SUCCESSOR BENEFICIARIES, Section A., Number (2), is hereby deleted in its entirety. New ARTICLE IX. DISTRIBUTIONS TO SUCCESSOR BENEFICIARIES, Section A., Number (2), is added thereto, and in place thereof shall read as follows:**

**SUCCESSOR BENEFICIARIES:** The persons herein named as successor beneficiaries, their birth dates and percent of interest, are:

Astor Hayes	10/01/25	33.33%
Roslyn Stewart	11/01/22	33.34%
Francine Robinson	06/19/26	33.33%

Notwithstanding any other provision, if a successor beneficiary does not survive the Settlor, or fails to survive the distribution of the trust estate, then the share of such deceased beneficiary shall be distributed in equal shares to the surviving named successor beneficiaries.

**Except as herein expressly amended, THE BOWLES LIVING TRUST, DATED SEPTEMBER 10, 1993, is hereby ratified, reaffirmed, and approved.**

**IN WITNESS HEREOF:**

I, THE UNDERSIGNED Settlor, have read the provisions of this Amendment and understand the provisions herein, and it is my intent to enter into this Amendment as written.

THEREFORE, the provisions of this Amendment shall bind the undersigned Settlor, and the undersigned Trustee, as well as any Successor Trustees assuming the role of Trustee hereunder, and all beneficiaries of this Trust and their successors and assigns.

Dated and signed at Riverside, California, this 14 day of 2000, 2000.

SETTLOR(S):

TRUSTEE(S):

Virginia M. Bowles  
VIRGINIA M. BOWLES

Virginia M. Bowles  
VIRGINIA M. BOWLES

AMENDMENT TO  
THE BOWLES LIVING TRUST  
Dated: SEPTEMBER 10, 1993

This Amendment to THE BOWLES LIVING TRUST is made this 11<sup>th</sup> day of JUNE, 2003, by the Trustor(s) and Trustee(s) for the Trust. Under the power of amendment reserved to the Trustor(s) of the Trust, the Trustor(s) amend the Trust as follows:

1. The following is added to the Trust:

ARTICLE IX, SECTION A, NUMBER (2)  
LARRY HAYES, A STEPHANIE HAYES, ROSLYN STEWART AND  
FRANCINE ROBERTSON EACH TO RECEIVE  
25%

2. The following is deleted from the Trust:

ARTICLE IX, SECTION A, NUMBER (2)  
DELETED IN ITS ENTIRETY

In all other respects, the Trust executed by the Trustor(s) is hereby affirmed.

Executed at RANCHO ALTA LOMA, on 11 JUNE, 2003

Virginia M. BOWLES

VIRGINIA M. BOWLES

Trustor Virginia M. Bowles

Trustee Virginia M. Bowles

NOTARY PUBLIC  
STATE OF CALIFORNIA )  
San Bernardino ) ss.  
COUNTY OF Riverside )

On JUN 11 2003 before me GARY M. JOBST (NOTARY PUBLIC), personally appeared VIRGINIA M. BOWLES, personally known to me (or proved to me on the basis of satisfactory evidence) to be person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s) or the entity upon behalf of which the person(s) acted, executed the instrument.

WITNESS my hand and official seal  
Signature [Handwritten Signature]

