

MINUTES OF THE BOARD OF SUPERVISORS  
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA



**9.15**

During the oral communication section of the agenda for Tuesday, July 17, 2012, Kevin Ollerton spoke regarding Public Guardianship's felony embezzlement.

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**ATTACHMENTS FILED WITH  
CLERK OF THE BOARD**

**AGENDA NO.  
9.15**

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address): Toni Eggebraaten, Esq SBN 164351 Law Office of Toni Eggebraaten 77564 Country Club Drive, #191 Palm Desert, CA 92211  TELEPHONE NO.: 760-772-4292 FAX NO. (Optional): 760-772-4293 E-MAIL ADDRESS (Optional): Toni@Eggebraatenlaw.com ATTORNEY FOR (Name): Riverside County Public Guardian	FOR COURT USE ONLY
SUPERIOR COURT OF CALIFORNIA, COUNTY OF RIVERSIDE STREET ADDRESS: 4050 Main Street MAILING ADDRESS: CITY AND ZIP CODE: Riverside, CA 92501 BRANCH NAME: Riverside Branch	
<input type="checkbox"/> ESTATE OF (Name): <input checked="" type="checkbox"/> IN THE MATTER OF (Name): The James R. Phelan and Amalie M. Phelan Family Trust,  <input type="checkbox"/> DECEDENT <input checked="" type="checkbox"/> TRUST <input type="checkbox"/> OTHER	
<b>NOTICE OF HEARING—DECEDENT'S ESTATE OR TRUST</b>	CASE NUMBER RIP 080974

This notice is required by law.  
 This notice does not require you to appear in court, but you may attend the hearing if you wish.

- NOTICE is given that (name): Riverside County Public Guardian  
 (representative capacity, if any): Successor Trustee  
 has filed (specify):\*  
 1) Final Account and Report of Successor Trustee After Final Distribution, Petition for Settlement Thereof and For Termination of Trust Proceeding  
 2) [Corrected] Order Settling Final Account, Discharging Trustee and Terminating Proceeding
- You may refer to the filed documents for more information. (Some documents filed with the court are confidential.)
- A HEARING on the matter will be held as follows:

a. Date: May 17, 2012 Time: 8:30 a.m. Dept.: 8 Room:

b. Address of court  shown above  is (specify):

Assistive listening systems, computer-assisted real-time captioning, or sign language interpreter services are available upon request if at least 5 days notice is provided. Contact the clerk's office for *Request or Accommodations by Persons With Disabilities and Order* (form MC-410). (Civil Code section 54.6.)



\* Do not use this form to give notice of a petition to administer estate (see Prob. Code, § 8100 and form DE-121) or notice of a hearing in a guardianship or conservatorship (see Prob. Code, §§ 1511 and 1822 and form GC-020).

<input type="checkbox"/> ESTATE OF (Name): <input checked="" type="checkbox"/> IN THE MATTER OF (Name): The James R. Phelan and Amalie M. Phelan Family Trust.	CASE NUMBER RIP 080974
<input type="checkbox"/> DECEDENT <input checked="" type="checkbox"/> TRUST <input type="checkbox"/> OTHER	

**CLERK'S CERTIFICATE OF POSTING**

1. I certify that I am not a party to this cause.
2. A copy of the foregoing *Notice of Hearing—Decedent's Estate or Trust*
  - a. was posted at (address):
  
  - b. was posted on (date):

Date: \_\_\_\_\_ Clerk by \_\_\_\_\_, Deputy

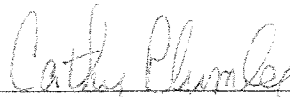
**PROOF OF SERVICE BY MAIL \***

1. I am over the age of 18 and not a party to this cause. I am a resident of or employed in the county where the mailing occurred.
2. My residence or business address is (specify):  
 77564 Country Club Drive, #191  
 Palm Desert, Ca 92211
3. I served the foregoing *Notice of Hearing—Decedent's Estate or Trust* on each person named below by enclosing a copy in an envelope addressed as shown below AND
  - a.  **depositing** the sealed envelope on the date and at the place shown in item 4 with the United States Postal Service with the postage fully prepaid.
  - b.  **placing** the envelope for collection and mailing on the date and at the place shown in item 4 following our ordinary business practices. I am readily familiar with this business's practice for collecting and processing correspondence for mailing. On the same day that correspondence is placed for collection and mailing, it is deposited in the ordinary course of business with the United States Postal Service in a sealed envelope with postage fully prepaid.
- 4 a. Date mailed: March 19, 2012      b. Place mailed (city, state): Palm Desert, CA
5.  served with the *Notice of Hearing—Decedent's Estate or Trust* a copy of the petition or other document referred to in the Notice.

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

Date: March 19, 2012

Cathy Plumlee



TYPE OR PRINT NAME OF PERSON COMPLETING THIS FORM:

(SIGNATURE OF PERSON COMPLETING THIS FORM)

**NAME AND ADDRESS OF EACH PERSON TO WHOM NOTICE WAS MAILED**

	<u>Name of person served</u>	<u>Address (number, street, city, state, and zip code)</u>
1.		
2.	SEE ATTACHED SERVICE LIST	
3.		
4.		

Continued on an attachment. (You may use Attachment to Notice of Hearing Proof of Service by Mail, form DE-120(MA)/GC-020(MA), for this purpose.)

\* Do not use this form for proof of personal service. You may use form DE-120(P) to prove personal service of this Notice.

SERVICE LIST

Judith Phelan ID# 1166  
PO Box 1198  
Sacramento, CA 95812

Janet Phelan  
258 A Street, #1-15  
Ashland, OR 97520  
(email: janetphelan@yahoo.com  
and janet c phelan@yahoo.com)

Janet C. Phelan  
Buddy's  
150-H Calle 19  
Progreso, YU 97320  
Mexico  
VIA AIRMAIL

Salvation Army  
Legal Department  
Estates Management Unit – SM Section  
180 E. Ocean Blvd., 9<sup>th</sup> Fl.  
Long Beach, CA 90802

Wildlife Way Station  
14831 Little Tujunga Canyon Road  
Angeles National Forest, CA 91342

Animal Friends of the Valley  
fka Lake Elsinore Animal Friends  
PO Box 1143  
Lake Elsinore, CA 92531

Delta Rescue  
PO Box 9  
Glendale, CA 91209

Attorney General  
State of California  
Registry of Charitable Trusts  
PO Box 903447  
Sacramento, CA 94203-4470

Riverside County Public Guardian  
PO Box 1405  
Riverside, CA 92502

1 Toni Eggebraaten, Esq. (SBN 164351)  
77-564A Country Club Drive, #191  
2 Palm Desert, CA 92211  
Telephone: (760) 772-4292  
3 Facsimile: (760) 772-4293

4 Attorney for Riverside County  
Public Guardian  
5  
6  
7

8 SUPERIOR COURT OF CALIFORNIA

9 COUNTY OF RIVERSIDE

10  
11 Conservatorship of ) Case No. RIP 080974  
12 AMALIE M. PHELAN, )  
13 Conservatee. ) Assigned for all purposes to  
14 ----- ) the Hon. Judge Thomas Cahraman,  
15 In Re: ) Department 8  
16 THE JAMES R. PHELAN and AMALIE )  
17 M. PHELAN FAMILY TRUST ) **[CORRECTED] ORDER SETTLING**  
18 ) **FINAL ACCOUNT, DISCHARGING**  
19 ) **TRUSTEE AND TERMINATING**  
20 ) **PROCEEDING**  
21 ) [Probate Code § 17200]  
22 )  
23 ) Date: May 17, 2012  
24 ) Time: 8:30 a.m.  
25 ) Dept: 8  
26 )  
27 )  
28 )

23 The final account and petition for settlement thereof filed  
24 by the Riverside County Public Guardian, the currently-serving  
25 Successor Trustee of the above-referenced trust, came on regularly  
26 for hearing on this date, the Honorable Thomas Cahraman, Judge  
27 Presiding. Toni Eggebraaten appeared as attorney for the  
28 petitioner.

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4. All the acts and transactions of the Public Guardian,  
as set forth in the account and petition or related to the matters  
set forth therein, are ratified, confirmed and approved.

By: \_\_\_\_\_  
Hon. Thomas Cahraman,  
Judge of the Superior Court

1 Toni Eggebraaten, Esq. (SBN 164351)  
77-564A Country Club Drive, #191  
2 Palm Desert, CA 92211  
Telephone: (760) 772-4292  
3 Facsimile: (760) 772-4293

4 Attorney for Riverside County  
Public Guardian  
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**FILED**  
SUPERIOR COURT OF CALIFORNIA  
COUNTY OF RIVERSIDE

MAR 16 2012

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8 SUPERIOR COURT OF CALIFORNIA  
9 COUNTY OF RIVERSIDE  
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11 Conservatorship of ) Case No. RIP 080974  
12 AMALIE M. PHELAN, )  
13 Conservatee. ) Assigned for all purposes to  
14 ) the Hon. Judge Thomas Cahraman,  
Department 8

15 ----- )  
16 In Re: ) **FINAL ACCOUNT AND REPORT OF**  
17 THE JAMES R. PHELAN and AMALIE ) **SUCCESSOR TRUSTEE AFTER FINAL**  
M. PHELAN FAMILY TRUST ) **DISTRIBUTION, PETITION FOR**  
18 ) **SETTLEMENT THEREOF AND FOR**  
19 ) **TERMINATION OF TRUST PROCEEDING**  
20 ) [Probate Code §§ 1061-1064, and  
21 ) 17200]

22 )  
23 ) Date: MAY 17 2012  
24 ) Time: 8:30 AM  
25 ) Dept: 8  
26 )  
27 )  
28 )

23 Elizabeth Aquarian, Supervising Deputy Public Guardian for  
24 the Riverside County Public Guardian, the currently-serving  
25 Successor Trustee of the above-referenced Family Trust, declares  
26 as follows:

27 / / /  
28

1           1.     On July 2, 2009, the Riverside County Public Guardian  
2 was appointed the new Successor Trustee of The James R. Phelan and  
3 Amalie M. Phelan Family Trust (the "Family Trust").

4           2.     Upon the death of the last of the two settlors, the  
5 Family Trust was to be divided into two separate trusts for each  
6 of two beneficiaries, the settlors' daughters, Judith and Janet  
7 Phelan.

8           3.     On May 9, 2011, an order was entered in this matter  
9 settling petitioner's first account current, and authorizing and  
10 directing petitioner to divide the Family Trust into two equal  
11 shares. Each of the two shares was to be used to fund two  
12 separate trusts, one for the benefit of Janet Phelan and the other  
13 for the benefit of Judith Phelan; with an offset of \$11,594.35  
14 against the share used to fund Janet Phelan's trust. Further,  
15 petitioner was to file a final accounting for the Family Trust  
16 after the corpus was distributed into the two new and separate  
17 trusts.

18           4.     Petitioner has completed the distribution of the entire  
19 corpus of the Family Trust into two new and separate trusts and  
20 now files his final accounting as to the Family Trust. The two  
21 new trusts are being administered separately and independently of  
22 one another. Subsequent accountings for the two new trusts shall  
23 be filed under two new court case numbers.

24           5.     Now, therefore, the Public Guardian herewith presents  
25 his final account and report of the administration of the Family  
26 Trust, covering the period from December 2, 2010 through August  
27 22, 2011. For that term, the Public Guardian is chargeable and  
28



1 entitled to the credits as set forth in the Summary of Account and  
2 supporting schedules attached as Exhibit A.

3 6. The Public Guardian reserves the right to petition for  
4 fees and expenses related hereto at the time of the first  
5 accountings on the sub-trusts.

6 7. Petitioner has made a diligent search of all available  
7 records in these proceedings and is informed and believes that the  
8 persons set forth on the Notice of Hearing filed with respect to  
9 this petition are entitled to and have received notice of these  
10 proceedings.

11 8. A Request for Special Notice has been filed. Notice  
12 will be given as required by law.

13

14 NOW, THEREFORE, the Public Guardian prays that:

15 1. Administration of the Family Trust be brought to a  
16 close, with the issue of fees and expenses reserved for  
17 consideration at the time of the accountings on the sub-trusts;

18 2. This account and report be settled, allowed and  
19 approved;

20 3. All the acts and transactions of the Public Guardian,  
21 as set forth in this account and report or relating to the matters  
22 set forth herein be ratified, confirmed and approved; and

23 / / /

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1 4. For such other and further orders as the Court deems  
2 necessary and proper.

3  
4 Dated: March 8, 2012 JERRY WENGERD, PUBLIC GUARDIAN

5 By: Elizabeth Aquarian  
6 Elizabeth Aquarian,  
7 Supervising Deputy Public  
8 Guardian BY FAX

9 By: Toni Eggebraaten  
10 Toni Eggebraaten, Attorney

11  
12 VERIFICATION

13 I am the Supervising Deputy for the Public Guardian of  
14 Riverside County, the Successor Trustee of The James R. Phelan and  
15 Amalie M. Phelan Family Trust, and I am authorized to make the  
16 foregoing petition on his behalf.

17 I have read the foregoing and know the content thereof and  
18 that the same is true of my own knowledge except as to those  
19 matters which are therein stated upon my information and belief  
20 and, as to those matters, I believe it to be true.

21 I declare under penalty of perjury under the laws of the  
22 State of California that the foregoing is true and correct and  
23 executed this 8th day of March, 2012, at Riverside,  
24 California.

25 Elizabeth Aquarian  
26 Elizabeth Aquarian

EXHIBIT A

CONSERVATORSHIP <input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> OF (Name): PHELAN, AMALIE TRUST ACCOUNT	CASE NUMBER RIP 080974
Conservatee <input type="checkbox"/> Minor	

## SUMMARY OF ACCOUNT—STANDARD AND SIMPLIFIED ACCOUNTS

SECOND  and Final Account ( ) Account Current  
 Account number ("First," etc.)

12/02/10 through 08/22/11 TERM  
 Opening date of account Closing date of account

## CHARGES\*

Property on Hand on at Beginning of Account Period, consisting of:		
1a	Cash Assets	\$ 5,704.93
1b	Non-Cash Assets (carry value)	213,339.02
1c	Total Property on Hand at Beginning of Account Period (add 1a and 1b) \$ 219,043.95	
2	Additional Property Received During Period of Account	— Schedule
3	Receipts During Period of Account	— Schedule A 41,587.58
4	Gains on Sales During Period of Account UBS ACCOUNT	— Schedule B 10,328.09
5	Other Charges (describe):	— Schedule B1
6	Net Income From Trade or Business During Period of Account	— Schedule
7	TOTAL CHARGES (add 1c, 2, 3, 4, 5, and 6) \$ 270,959.62	

## CREDITS\*

8	Disbursements During Period of Account	— Schedule C	\$ 70,775.67
9	Losses on Sales During Period of Account	— Schedule D	0.00
10	Distributions to Conservatee or Ward	— Schedule	0.00
11	Other Credits (describe): Withdrawals, Transfers	— Schedule D1-3	200,183.95
12	Net Loss From Trade or Business During Period of Account	— Schedule	0.00
Property on Hand at End of Account Period			— Schedule E, consisting of:
13a	Cash Assets	\$	0.00
13b	Non-Cash Assets (carry value)		0.00
13c	Total Property on Hand at End of Account Period (add 13a and 13b)		
14	TOTAL CREDITS (add 8, 9, 10, 11, 12, and 13c) \$ 270,959.62		

\* (Enter "0" for all categories of charges or credits for which you have no entries. Do not include schedules for these categories, but do not relabel or redesignate the schedules that are included.)

PHELAN, AMALIE TRUST ACCOUNT  
CASH ASSETS ON HAND AT THE BEGINNING OF ACCOUNT PERIOD  
STANDARD AND SIMPLIFIED  
12/02/10 TO 08/22/11

DESCRIPTION OF ASSETS	VALUE
CASH IN PUBLIC GUARDIAN TRUST	\$ 5,644.62
CASH AND MONEY BALANCE UBS ACCT #KY 29109 24 AS OF 8/31/09	\$ 60.31
TOTAL CASH ON HAND	<u>\$ 5,704.93</u>

PHELAN, AMALIE TRUST ACCOUNT  
 NON-CASH ASSETS ON HAND AT THE BEGINNING OF ACCOUNT PERIOD  
 STANDARD AND SIMPLIFIED  
 12/02/10 TO 08/22/11

DESCRIPTION OF NON-CASH ASSETS	ESTIMATED MARKET VALUE	CARRY VALUE
<b>RECEIPTS FOR ASSETS FILED 10/15/10</b>		
<b>PACE AND NON-PACE - EQUITIES</b>		
1) 674.203 SHRS AMERICAN FUNDS GROWTH FUND OF AMERICA CLASS F \$24.780/SHR	\$ 19,329.40	\$ 16,706.72
2) 1,716.643 SHRS AMERICAN FUNDS WASHINGTON MUTUAL INVESTORS \$22.640/SHR	\$ 44,289.38	\$ 38,864.77
3) 999.927 SHRS LORD ABBETT MID CAP VALUE FUND CL A \$11.830/SHR	\$ 15,258.88	\$ 11,829.11
4) 364.939 SHRS VIRTUS REAL ESTATE SECURITIES FUND CLASS A \$19.000/SHR	\$ 9,740.22	\$ 6,933.83
5) 7.000 SHRS COMMON STOCK PORTLAND FENL ELC CO NEW \$19.520/SHR	\$ 148.19	\$ 136.64
6) 500.000 SHRS ESCROW ENRON CAP TRUST II (PRICE UNAVAILABLE)	\$ -	\$ -
<b>TOTAL EQUITIES</b>	<b>\$ 88,766.07</b>	<b>\$ 74,471.07</b>
<b>PACE - FIXED INCOME</b>		
1) 3,259.002 PIMCO TOTAL RETURN FUND CLASS A \$10.780/SHR	\$ 37,445.93	\$ 35,132.02
2) 23,416.699 VIRTUS MULTI - SCTOR SHORT TERM BOND FUND CLASS A \$4.430/SHR	\$ 112,165.88	\$ 103,735.93
<b>TOTAL FIXED INCOME</b>	<b>\$ 149,611.91</b>	<b>\$ 138,867.95</b>
<b>TOTAL NON-CASH ASSETS</b>	<b>\$ 238,377.98</b>	<b>\$ 213,339.02</b>

PHELAN, AMALIE TRUST ACCOUNT  
SCHEDULE A - RECEIPTS  
**SIMPLIFIED ACCOUNT**  
12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN. DATE	VENDOR NAME	REF#	AMOUNT
	SCHEDULE A - RECEIPTS - DIVIDENDS			\$ 6,354.95	
	SCHEDULE A - RECEIPTS - INTERESTS			\$ 0.40	
	SCHEDULE A - RECEIPTS - OTHER RECEIPTS			\$ 35,232.23	
			TOTAL RECEIPTS		<u>\$ 41,587.58</u>

PHELAN, AMALIE TRUST ACCOUNT  
 SCHEDULE A - RECEIPTS  
 DIVIDENDS  
 STANDARD ACCOUNT  
 12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN. DATE	VENDOR NAME	REF#	AMOUNT
	DIVIDEND	12/1/2010	VIRTUS MULTI SECTOR	\$ 448.63	
	DIVIDEND	1/3/2011	VIRTUS MULTI SECTOR	\$ 491.93	
	DIVIDEND	2/1/2011	VIRTUS MULTI SECTOR	\$ 415.08	
	DIVIDEND	3/1/2011	VIRTUS MULTI SECTOR	\$ 444.23	
	DIVIDEND	4/1/2011	VIRTUS MULTI SECTOR	\$ 438.41	
	DIVIDEND	5/2/2011	VIRTUS MULTI SECTOR	\$ 434.65	
	DIVIDEND	6/1/2011	VIRTUS MULTI SECTOR	\$ 394.32	\$ 3,067.25
	DIVIDEND	12/23/2011	VIRTUS REAL ESTATE SEC	\$ 29.20	
	DIVIDEND	3/24/2011	VIRTUS REAL ESTATE SEC	\$ 22.51	\$ 51.71
	DIVIDEND	12/1/2011	PIMCO TOTAL RETURN	\$ 95.27	
	ST CAP GAIN	12/9/2011	PIMCO TOTAL RETURN	\$ 1,205.96	
	LT CAP GAIN	12/9/2011	PIMCO TOTAL RETURN	\$ 551.42	
	DIVIDEND	1/3/2011	PIMCO TOTAL RETURN	\$ 100.80	
	DIVIDEND	2/1/2011	PIMCO TOTAL RETURN	\$ 81.47	
	DIVIDEND	3/1/2011	PIMCO TOTAL RETURN	\$ 85.33	
	DIVIDEND	4/1/2011	PIMCO TOTAL RETURN	\$ 87.63	
	DIVIDEND	5/2/2011	PIMCO TOTAL RETURN	\$ 87.15	
	DIVIDEND	6/1/2011	PIMCO TOTAL RETURN	\$ 86.87	\$ 2,381.90
	DIVIDEND	12/20/2011	AM FUNDS WASHINGTON	\$ 377.66	
	DIVIDEND	3/21/2011	AM FUNDS WASHINGTON	\$ 250.45	\$ 628.11
	DIVIDEND	12/21/2011	LORD ABBETT MID CAP VALUE	\$ 56.10	\$ 56.10
	DIVIDEND	12/22/2011	AM FUNDS GROWTH FUND	\$ 165.92	\$ 165.92
	ST CAP GAIN	12/10/2011	UBS CASHFUND INC	\$ 0.04	
	DIVIDEND	6/1/2011	UBS CASHFUND INC	\$ 0.21	
	DIVIDEND	7/31/2011	UBS CASHFUND INC	\$ 0.07	\$ 0.32
	DIVIDEND	1/18/2011	PORTLAND GENL ELEC CO	\$ 1.82	
	DIVIDEND	4/15/2011	PORTLAND GENL ELEC CO	\$ 1.82	\$ 3.64
			TOTAL RECEIPTS		\$ 6,354.95



PHELAN, AMALIE TRUST ACCOUNT  
SCHEDULE A - RECEIPTS  
INTEREST  
STANDARD ACCOUNT  
12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN. DATE	VENDOR NAME	REF#	AMOUNT
901	AB1018 INTEREST FROM 10/01/10 TO 12/31/10 ADB= 2818.42	1/31/2011			\$ 0.17
901	AB1018 INTEREST FROM 01/01/11 TO 03/31/11 ADB= 2755.84	4/18/2011			\$ 0.23
			TOTAL RECEIPTS		<u>\$ 0.40</u>

PHELAN, AMALIE TRUST ACCOUNT  
 SCHEDULE A - RECEIPTS  
 OTHER RECEIPTS  
 STANDARD ACCOUNT  
 12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN. DATE	VENDOR NAME	REF#	AMOUNT
126	OTHER RECEIPTS WITHDRAWAL FROM ACCT#KY 29109 1 CK DTD 1/21/11	1/26/2011	UBS FINANCIAL SERVIC	1289634	\$ 10,000.00
126	OTHER RECEIPTS WITHDRAWAL FROM ACCT# KY29109 1 CK DTD 3/25/11	3/28/2011	UBS FINANCIAL SERVIC	132852	\$ 10,000.00
126	OTHER RECEIPTS WITHDRAWAL FROM ACCT#KY 29109 1 CK DTD 4/21/11	4/27/2011	UBS FINANCIAL SERVIC	1345656	\$ 10,000.00
	DEPOSIT - LOCAL CHECK AS OF 5/26/11	5/27/2011	UBS FINANCIAL SERVIC		\$ 5,232.23
			TOTAL RECEIPTS		<u>\$ 35,232.23</u>

PHELAN, AMALIE TRUST ACCOUNT  
SCHEDULE C - DISBURSEMENTS  
SIMPLIFIED ACCOUNT  
12/02/10 TO 08/22/11

<u>CODE</u>	<u>DESCRIPTION</u>	<u>TRAN DATE</u>	<u>VENDOR NAME</u>	<u>CHECK#</u>	<u>AMOUNT</u>
	SCHEDULE C - DISBURSEMENTS - FEES			\$ 34,033.53	
	SCHEDULE C - DISBURSEMENTS - DIST. FBO JANET PHELAN			\$ 15,000.00	
	SCHEDULE C - DISBURSEMENTS - DIST. FBO JUDITH PHELAN			\$ 15,000.00	
	SCHEDULE C - DISBURSEMENTS - UBS MANAGEMENT FEES			\$ 1,097.12	
	SCHEDULE C - DISBURSEMENTS - OTHER EXPENSES			\$ <u>5,645.02</u>	
			TOTAL DISBURSEMENTS		\$ <u>70,775.67</u>

PHELAN, AMALIE TRUST ACCOUNT  
 SCHEDULE C - DISBURSEMENTS  
 FEES OF FIDUCIARY AND ATTORNEY  
 STANDARD ACCOUNT  
 12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN. DATE	VENDOR NAME	REF#	AMOUNT
	WITHDRAWAL FOR PAYMENT PER C/O 5/9/11	6/29/2011	JERRY A. WENGERD, PUBLIC GUARDIAN	CK#183283 \$	9,167.27
	WITHDRAWAL FOR PAYMENT PER C/O 5/9/11	6/29/2011	TONI EGGBRAATEN	CK#183284 \$	23,031.75
	WITHDRAWAL FOR PAYMENT PER C/O 5/9/11	6/29/2011	SUPERIOR COURT OF CALIFORNIA, RIVERSIDE COUNTY CLERK	CK#183286 \$	1,150.00
	WITHDRAWAL FOR PAYMENT PER C/O 5/9/11	6/29/2011	RIVERSIDE COUNTY TREASURER	CK#183285 \$	684.51
			TOTAL DISBURSEMENTS		\$ 34,033.53

PHELAN, AMALIE TRUST ACCOUNT  
 SCHEDULE C - DISBURSEMENTS  
 OTHER EXPENSES - DISTRIBUTION TO JANET PHELAN  
 STANDARD ACCOUNT  
 12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN.DATE	VENDOR.NAME	CHECK#	AMOUNT
421	OTHER Jan-11 STIPEND	12/16/2010	JANET PHELAN	384142	\$ 2,500.00
421	OTHER Feb-11 STIPEND	1/27/2011	JANET PHELAN	385240	\$ 2,500.00
421	OTHER Mar-11 STIPEND	2/28/2011	JANET PHELAN	386230	\$ 2,500.00
421	OTHER Apr-11 STIPEND	3/28/2011	JANET PHELAN	387188	\$ 2,500.00
421	OTHER May-11 STIPEND	4/19/2011	JANET PHELAN	388035	\$ 2,500.00
421	OTHER Jun-11 STIPEND	5/24/2011	JANET PHELAN	389044	\$ 2,500.00
TOTAL DISBURSEMENTS					<u>\$ 15,000.00</u>

PHELAN, AMALIE TRUST ACCOUNT  
 SCHEDULE C - DISBURSEMENTS  
 OTHER EXPENSES - DISTRIBUTION FBO JUDITH PHELAN  
 STANDARD ACCOUNT  
 12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN DATE	VENDOR NAME	CHECK#	AMOUNT
421	OTHER Jan-11 STIPEND	12/16/2010	FBO JUDITH PHELAN	384120	\$ 2,500.00
421	OTHER Feb-11 STIPEND	1/27/2011	FBO JUDITH PHELAN	385228	\$ 2,500.00
421	OTHER Mar-11 STIPEND	2/28/2011	FBO JUDITH PEHLAN	386229	\$ 2,500.00
421	OTHER Apr-11 STIPEND	3/28/2011	FBO JUITH PHELAN	387187	\$ 2,500.00
421	OTHER May-11 STIPEND	4/19/2011	FBO JUDITH PHELAN	388021	\$ 2,500.00
421	OTHER Jun-11 STIPEND	5/24/2011	FBO JUDITH PHELAN	389036	\$ 2,500.00
TOTAL DISBURSEMENTS					<u>\$ 15,000.00</u>

PHELAN, AMALIE TRUST ACCOUNT  
SCHEDULE D1  
OTHER CREDITS - UBS ACCOUNT  
STANDARD ACCOUNT  
12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN.DATE	VENDOR.NAME	CHECK#	AMOUNT
	WITHDRAWAL REQUESTED	1/21/2011	PUBLIC GUARDIAN	1289634	\$ 10,000.00
	WITHDRAWAL REQUESTED	3/25/2011	PUBLIC GUARDIAN	132852	\$ 10,000.00
	WITHDRAWAL REQUESTED	4/21/2011	PUBLIC GUARDIAN	1345656	\$ 10,000.00
			TOTAL DISBURSEMENTS		<u>\$ 30,000.00</u>

PHELAN, AMALIE TRUST ACCOUNT  
 SCHEDULE D3  
 OTHER CREDITS - UBS ACCOUNT  
 STANDARD ACCOUNT  
 12/02/10 TO 08/22/11

DESCRIPTION	SHARES	CARRY VALUE	TOTAL CARRY VALUE
TRANSFER 1/2 UBS HOLDINGS IN FAMILY TRUST TO JUDITH'S TRUST			
TRANSFER 1/2 UBS HOLDINGS IN FAMILY TRUST TO JANET'S TRUST			
6/2/11			
AM FUNDS GROWTH			
TRANSFER TO JUDITH'S TRUST	(237.928)	\$ 5,895.86	
TRANSFER TO JANET'S TRUST	(237.928)	<u>\$ 5,895.86</u>	\$ 11,791.72
6/2/11			
VIRTUS MULTI-SECTOR			
TRANSFER TO JUDITH'S TRUST	(8,845.631)	\$ 39,186.15	
TRANSFER TO JANET'S TRUST	(8,845.631)	<u>\$ 39,186.15</u>	\$ 78,372.30
6/2/11			
VIRTUS REAL ESTATE			
TRANSFER TO JUDITH'S TRUST	(130.591)	\$ 2,481.23	
TRANSFER TO JANET'S TRUST	(130.591)	<u>\$ 2,481.23</u>	\$ 4,962.46
6/2/11			
LORD ABBETT MID CAP			
TRANSFER TO JUDITH'S TRUST	(335.088)	\$ 3,964.10	
TRANSFER TO JANET'S TRUST	(355.088)	<u>\$ 3,964.10</u>	\$ 7,928.20
6/2/11			
AM FUNDS WAMU			
TRANSFER TO JUDITH'S TRUST	(605.307)	\$ 13,704.15	
TRANSFER TO JANET'S TRUST	(605.307)	<u>\$ 13,704.15</u>	\$ 27,408.30
6/2/11			
PIMCO TOTAL RETURN			
TRANSFER TO JUDITH'S TRUST	(1,275.156)	\$ 13,746.19	
TRANSFER TO JANET'S TRUST	(1,275.156)	<u>\$ 13,746.19</u>	\$ 27,492.38
6/2/11			
ESCROW ENRON CAP TRUST			
TRANSFER TO JUDITH'S TRUST	(250.00)	INFO UNAVAILABLE	
TRANSFER TO JANET'S TRUST	(250.00)	INFO UNAVAILABLE	
8/22/11			
UBS CASHFUND INC.			
TRANSFER TO JUDITH'S TRUST		\$ 317.12	
TRANSFER TO JANET'S TRUST		<u>\$ 317.12</u>	\$ 634.24
TOTAL OTHER CREDITS- TRANSFER			<u>\$ 158,589.60</u>



PHELAN, AMALIE TRUST ACCOUNT  
SCHEDULE E  
CASH ASSETS ON HAND AT END OF ACCOUNT PERIOD  
STANDARD AND SIMPLIFIED  
12/02/10 TO 08/22/11

DESCRIPTION OF ASSETS	VALUE
CASH IN PUBLIC GUARDIAN TRUST	\$0.00
CASH AND MONEY BALANCE UBS ACCT #KY 29109 24 AS OF 8/22/11	<u>\$0.00</u>
TOTAL CASH ASSETS	<u><u>\$0.00</u></u>

PHELAN, AMALIE TRUST ACCOUNT  
 SCHEDULE E  
 NON-CASH ASSETS ON HAND AT END OF ACCOUNT PERIOD  
 STANDARD AND SIMPLIFIED  
 12/02/10 TO 08/22/11

DESCRIPTION OF NON-CASH ASSETS	ESTIMATED MARKET VALUE	CARRY VALUE
=====		
RECEIPTS FOR ASSETS FILED 10/15/10		
PACE AND NON-PACE - EQUITIES	\$ -	\$ -
PACE - FIXED INCOME	\$ -	\$ -
TOTAL NON-CASH ASSETS	<u>\$ -</u>	<u>\$ -</u>

6/2/11	TRANSFER TO JUDITH'S TRUST		-335.088	\$	(3,964.10)	
	TRANSFER TO JANET'S TRUST		-335.088	\$	(3,964.10)	
	ENDING BALANCE		0.000		\$0.00	\$0.00
	BEGINNING BALANCE		1,716.643	\$	38,864.77	
1/20/11	AM FUNDS WAMU	SOLD	-100.852	\$	(2,283.29)	
3/25/11	AM FUNDS WAMU	SOLD	-89.764	\$	(2,032.26)	
4/21/11	AM FUNDS WAMU	SOLD	-64.293	\$	(1,455.59)	
5/31/11	AM FUNDS WAMU	SOLD	-251.118	\$	(5,685.31)	
6/16/11	AM FUNDS WAMU	SOLD	0.002	\$	0.05	
	SUB-TOTALS		-506.025	\$	(11,456.40)	
	TOTALS		1,210.618	\$	27,408.30	
6/2/11	TRANSFER TO JUDITH'S TRUST		-605.307	\$	(13,704.15)	
	TRANSFER TO JANET'S TRUST		-605.307	\$	(13,704.15)	
	ENDING BALANCE		0.000		(\$0.00)	\$0.00
	BEGINNING BALANCE		3,259.002	\$	35,132.02	
4/21/11	PIMCO TOTAL RETURN	SOLD	-143.443	\$	(1,546.32)	
5/31/11	PIMCO TOTAL RETURN	SOLD	-565.246	\$	(6,093.35)	
6/16/11	PIMCO TOTAL RETURN	SOLD	-0.001	\$	(0.01)	
	SUB-TOTALS		-708.69	\$	(7,639.68)	
	TOTALS		2,550.312	\$	27,492.38	
6/2/11	TRANSFER TO JUDITH'S TRUST		-1,275.156	\$	(13,746.19)	
	TRANSFER TO JANET'S TRUST		-1,275.156	\$	(13,746.19)	
	ENDING BALANCE		0.000		\$0.00	\$0.00
	BEGINNING BALANCE		7.000	\$	136.64	
5/31/11	PORTLAND GENL ELEC	SOLD	7.000	\$	(136.64)	
	ENDING BALANCE		7.000		\$0.00	\$0.00
	BEGINNING BALANCE		500.000			
6/2/11	ESCROW ENRON CAP TRUST	NO CHANGE				INFO UNAVAILABLE
	TRANSFER TO JUDITH'S TRUST		-250.000			
	TRANSFER TO JANET'S TRUST		-250.000			
	ENDING BALANCE		0.000			
	TOTAL NON-CASH ASSETS					\$0.00

PHELAN, AMALIE TRUST ACCOUNT  
 SCHEDULE F - CHANGES IN ASSETS  
 UBS INVESTMENT ACCOUNT  
 STANDARD ACCOUNT  
 12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN.DATE	VENDOR.NAME	CHECK#	AMOUNT
	BEGINNING BALANCE				
			SHARES	VALUE	
			674.203	\$ 16,706.72	
1/20/11	AM FUNDS GROWTH	SOLD	-44.582	\$ (1,104.74)	
3/25/11	AM FUNDS GROWTH	SOLD	-28.423	\$ (704.32)	
4/21/11	AM FUNDS GROWTH	SOLD	-25.368	\$ (628.62)	
5/31/11	AM FUNDS GROWTH	SOLD	-99.973	\$ (2,477.33)	
6/16/11	AM FUNDS GROWTH	SOLD	0.001	\$ 0.02	
	SUB-TOTALS		(198.345)	\$ (4,914.99)	
	TOTALS		475.858	\$ 11,791.72	
6/2/11	TRANSFER TO JUDITH'S TRUST		(237.928)	\$ (5,895.86)	
	TRANSFER TO JANET'S TRUST		(237.928)	\$ (5,895.86)	
	ENDING BALANCE		0.000	\$ 0.00	\$0.00
	BEGINNING BALANCE		23,416.699	\$ 103,735.93	
1/25/11	VIRTUS MULTI-SECTOR	SOLD	-121.304	\$ (537.38)	
3/25/11	VIRTUS MULTI-SECTOR	SOLD	-808.37	\$ (3,581.08)	
4/21/11	VIRTUS MULTI-SECTOR	SOLD	-968.238	\$ (4,289.29)	
5/31/11	VIRTUS MULTI-SECTOR	SOLD	-3827.524	\$ (16,955.93)	
	SUB-TOTALS		-5725.436	\$ (25,363.68)	
	TOTALS		17,691.263	\$ 78,372.30	
6/2/11	TRANSFER TO JUDITH'S TRUST		-8,845.631	\$ (39,186.15)	
	TRANSFER TO JANET'S TRUST		-8,845.631	\$ (39,186.15)	
	ENDING BALANCE		0.000	\$ 0.00	\$0.00
	BEGINNING BALANCE		364.939	\$ 6,933.83	
1/20/11	VIRTUS REAL ESTATE	SOLD	-23.934	\$ (454.75)	
3/25/11	VIRTUS REAL ESTATE	SOLD	-16.739	\$ (318.04)	
4/21/11	VIRTUS REAL ESTATE	SOLD	-13.249	\$ (251.73)	
5/31/11	VIRTUS REAL ESTATE	SOLD	-49.834	\$ (946.85)	
6/16/11	VIRTUS REAL ESTATE	SOLD	0.001	\$ 0.02	
	SUB-TOTALS		-103.755	\$ (3,971.35)	
	TOTALS		261.184	\$ 4,962.46	
6/2/11	TRANSFER TO JUDITH'S TRUST		-130.591	\$ (2,481.23)	
	TRANSFER TO JANET'S TRUST		-130.591	\$ (2,481.23)	
	ENDING BALANCE		0.000	\$ 0.00	\$0.00
	BEGINNING BALANCE		999.927	\$ 11,829.11	
1/20/11	LORD ABBETT MID CAP	SOLD	-100.175	\$ (1,185.07)	
3/25/11	LORD ABBETT MID CAP	SOLD	-55.889	\$ (661.17)	
4/21/11	LORD ABBETT MID CAP	SOLD	-35.453	\$ (419.41)	
5/31/11	LORD ABBETT MID CAP	SOLD	-138.234	\$ (1,635.31)	
	SUB-TOTALS		-329.751	\$ (3,900.96)	
	TOTALS		670.176	\$ 7,928.20	

PHELAN, AMALIE TRUST ACCOUNT  
SCHEDULE C - DISBURSEMENTS  
OTHER EXPENSES - MANAGEMENT FEE UBS ACCOUNT  
STANDARD ACCOUNT  
12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN. DATE	VENDOR NAME	REF#	AMOUNT
	ANNUAL FEE CHARGE	12/6/2010			\$ 75.00
	QUARTERLY FEE	1/24/2011			\$ 595.96
	QUARTERLY FEE	4/21/2011			\$ 578.80
	REFUND - PRORATE ADVISORY FEE	6/7/2011			\$ (152.64)
			TOTAL DISBURSEMENTS		<u>\$ 1,097.12</u>

PHELAN, AMALIE TRUST ACCOUNT  
 SCHEDULE B - GAIN ON SALE  
 UBS INVESTMENT ACCOUNT  
 STANDARD ACCOUNT  
 12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN.DATE	VENDOR.NAME	CHECK#	AMOUNT
		SHARES	COST	PROCEEDS	GAIN
1/20/11	VIRTUS REAL ESTATE	23.934 \$	454.75 \$	667.99 \$	213.22
3/25/11	VIRTUS REAL ESTATE	16.739 \$	318.04 \$	479.25 \$	161.19
4/21/11	VIRTUS REAL ESTATE	13.249 \$	251.73 \$	400.00 \$	148.25
5/31/11	VIRTUS REAL ESTATE	49.834 \$	946.85 \$	1,587.71 \$	640.85
6/16/11	VIRTUS REAL ESTATE	0.001 \$	0.02 \$	0.03 \$	0.01
		103.757 \$	1,971.38 \$	3,134.98 \$	1,163.52
1/20/11	AM FUNDS GROWTH	44.582 \$	1,104.74 \$	1,369.56 \$	264.81
3/25/11	AM FUNDS GROWTH	28.423 \$	704.32 \$	892.77 \$	188.44
4/21/11	AM FUNDS GROWTH	25.368 \$	628.62 \$	810.00 \$	181.37
5/31/11	AM FUNDS GROWTH	99.973 \$	2,477.33 \$	3,215.12 \$	737.78
6/16/11	AM FUNDS GROWTH	0.001 \$	0.02 \$	0.03 \$	0.01
		198.347 \$	4,915.04 \$	6,287.48 \$	1,372.41
1/20/11	LORD ABBETT	100.175 \$	1,185.07 \$	1,678.93 \$	493.85
3/25/11	LORD ABBETT	55.889 \$	661.17 \$	972.46 \$	311.29
4/21/11	LORD ABBETT	35.453 \$	419.41 \$	630.00 \$	210.59
5/31/11	LORD ABBETT	138.234 \$	1,635.31 \$	2,500.65 \$	865.34
		329.751 \$	3,900.95 \$	5,782.04 \$	1,881.07
1/20/11	AM FUNDS WASHINGTON	100.852 \$	2,283.29 \$	2,783.52 \$	500.22
3/25/11	AM FUNDS WASHINGTON	89.764 \$	2,032.26 \$	2,543.01 \$	510.74
4/21/11	AM FUNDS WASHINGTON	64.293 \$	1,455.59 \$	1,860.00 \$	404.40
5/31/11	AM FUNDS WASHINGTON	251.118 \$	5,685.31 \$	7,382.87 \$	1,698.55
6/16/11	AM FUNDS WASHINGTON	0.002 \$	0.05 \$	0.06 \$	0.01
		506.029 \$	11,456.50 \$	14,569.46 \$	3,113.92
1/25/11	VIRTUS MULTI-SECTOR	121.304 \$	537.38 \$	585.90 \$	48.50
3/25/11	VIRTUS MULTI-SECTOR	808.370 \$	3,581.08 \$	3,912.51 \$	331.41
4/21/11	VIRTUS MULTI-SECTOR	968.238 \$	4,289.29 \$	4,725.00 \$	435.70
5/31/11	VIRTUS MULTI-SECTOR	3,827.524 \$	16,955.93 \$	18,754.87 \$	1,798.39
		5,725.436 \$	25,363.68 \$	27,978.28 \$	2,614.00
4/21/11	PIMCO	143.443 \$	1,546.32 \$	1,578.00 \$	28.66
5/31/11	PIMCO	565.246 \$	6,093.35 \$	6,251.62 \$	158.27
6/16/01	PIMCO	0.001 \$	0.01 \$	0.01 \$	(0.00)
		708.690 \$	7,639.67 \$	7,829.63 \$	186.93
5/31/11	PORTLAND GEN ELECT	7.000	136.64 \$	132.88 \$	(3.76)
			TOTAL GAIN		\$10,328.09

PHELAN, AMALIE TRUST ACCOUNT  
SCHEDULE D1  
OTHER CREDITS - UBS ACCOUNT  
STANDARD ACCOUNT  
12/02/10 TO 08/22/11

CODE	DESCRIPTION	TRAN.DATE	VENDOR.NAME	CHECK#	AMOUNT
	WITHDRAWAL REQUESTED	1/21/2011	PUBLIC GUARDIAN	1289634	\$ 10,000.00
	WITHDRAWAL REQUESTED	3/25/2011	PUBLIC GUARDIAN	132852	\$ 10,000.00
	WITHDRAWAL REQUESTED	4/21/2011	PUBLIC GUARDIAN	1345656	\$ 10,000.00
			TOTAL DISBURSEMENTS		<u>\$ 30,000.00</u>

PHELAN, AMALIE TRUST ACCOUNT  
SCHEDULE D2  
OTHER CREDITS - UBS ACCOUNT  
STANDARD ACCOUNT  
12/02/10 TO 08/22/11

<u>CODE</u>	<u>DESCRIPTION</u>	<u>TRAN DATE</u>	<u>VENDOR NAME</u>	<u>CHECK#</u>	<u>AMOUNT</u>
	DEPOSIT TO JUDITH'S TRUST (per order for offset entered 5/9/11)				<u>\$ 11,594.35</u>



PHELAN, AMALIE TRUST ACCOUNT  
 SCHEDULE D3  
 OTHER CREDITS - UBS ACCOUNT  
 STANDARD ACCOUNT  
 12/02/10 TO 08/22/11

DESCRIPTION	SHARES	CARRY VALUE	TOTAL CARRY VALUE
TRANSFER 1/2 UBS HOLDINGS IN FAMILY TRUST TO JUDTH'S TRUST			
TRANSFER 1/2 UBS HOLDINGS IN FAMILY TRUST TO JANET'S TRUST			
6/2/11			
AM FUNDS GROWTH			
TRANSFER TO JUDITH'S TRUST	(237.928)	\$ 5,895.86	
TRANSFER TO JANET'S TRUST	(237.928)	<u>\$ 5,895.86</u>	\$ 11,791.72
6/2/11			
VIRTUS MULTI-SECTOR			
TRANSFER TO JUDITH'S TRUST	(8,845.631)	\$ 39,186.15	
TRANSFER TO JANET'S TRUST	(8,845.631)	<u>\$ 39,186.15</u>	\$ 78,372.30
6/2/11			
VIRTUS REAL ESTATE			
TRANSFER TO JUDITH'S TRUST	(130.591)	\$ 2,481.23	
TRANSFER TO JANET'S TRUST	(130.591)	<u>\$ 2,481.23</u>	\$ 4,962.46
6/2/11			
LORD ABBETT MID CAP			
TRANSFER TO JUDITH'S TRUST	(335.088)	\$ 3,964.10	
TRANSFER TO JANET'S TRUST	(355.088)	<u>\$ 3,964.10</u>	\$ 7,928.20
6/2/11			
AM FUNDS WAMU			
TRANSFER TO JUDITH'S TRUST	(605.307)	\$ 13,704.15	
TRANSFER TO JANET'S TRUST	(605.307)	<u>\$ 13,704.15</u>	\$ 27,408.30
6/2/11			
PIMCO TOTAL RETURN			
TRANSFER TO JUDITH'S TRUST	(1,275.156)	\$ 13,746.19	
TRANSFER TO JANET'S TRUST	(1,275.156)	<u>\$ 13,746.19</u>	\$ 27,492.38
6/2/11			
ESCROW ENRON CAP TRUST			
TRANSFER TO JUDITH'S TRUST	(250.00)	INFO UNAVAILABLE	
TRANSFER TO JANET'S TRUST	(250.00)	INFO UNAVAILABLE	
8/22/11			
UBS CASHFUND INC.			
TRANSFER TO JUDITH'S TRUST		\$ 317.12	
TRANSFER TO JANET'S TRUST		<u>\$ 317.12</u>	\$ 634.24
TOTAL OTHER CREDITS- TRANSFER			<u>\$ 158,589.60</u>

PHELAN, AMALIE TRUST ACCOUNT  
SCHEDULE E  
CASH ASSETS ON HAND AT END OF ACCOUNT PERIOD  
STANDARD AND SIMPLIFIED  
12/02/10 TO 08/22/11

DESCRIPTION OF ASSETS	VALUE
CASH IN PUBLIC GUARDIAN TRUST	\$0.00
CASH AND MONEY BALANCE UBS ACCT #KY 29109 24 AS OF 8/22/11	<u>\$0.00</u>
TOTAL CASH ASSETS	<u><u>\$0.00</u></u>

**Riverside County Board of Supervisors  
Request to Speak**

Submit request to Clerk of Board (right of podium),  
Speakers are entitled to three (3) minutes, subject  
Board Rules listed on the reverse side of this form.

**SPEAKER'S NAME:** KEVIN O'BRYEN

**Address:** 3091 SIERRA AVE  
(only if follow-up mail response requested)

**City:** NORCO **Zip:** 92860

**Phone #:** 951-317-4196

**Date:** 7-17-12 **Agenda #** GRA1 COM CONSERVATION

**PLEASE STATE YOUR POSITION BELOW:**

**Position on "Regular" (non-appealed) Agenda Item:**

**Support**       **Oppose**       **Neutral**

**Note:** If you are here for an agenda item that is filed  
for "Appeal", please state separately your position on  
the appeal below:

**Support**       **Oppose**       **Neutral**

**I give my 3 minutes to:** \_\_\_\_\_