

MARIN COUNTY SUPERIOR COURT

P.O. Box 4988
San Rafael, CA 94913-4988

NAME _____ STATE BAR NUMBER _____

ADDRESS _____

**NOTICE OF TRANSFER OF ESTATE PLANNING DOCUMENTS TO
COURT EXECUTIVE OFFICER OF THE MARIN COUNTY SUPERIOR COURT**

In accordance with the provisions of Probate Code § 732(c), the estate planning documents listed below are submitted for deposit with the Court Executive Officer (attach additional pages if necessary):

- 1. _____
- 2. _____
- 3. _____

I certify that under Probate Code § 735 that:

- 1) I am the attorney with whom these documents have been deposited.
 - I am the law partner, or shareholder, or employee of the business of the attorney with whom these documents have been deposited.
 - I am the conservator of the attorney, or acting under durable power of attorney, for the attorney with whom these documents have been deposited.
 - I am the personal representative for the estate of the attorney with whom these documents have been deposited.
- 2) I mailed notice of termination to (name of depositor) _____
at (last known address of depositor) _____
on ____/____/____.
- 3) The estate planning documents are transferred to the Court Executive Officer because (name of attorney) _____, State Bar Number _____, with whom the documents were previously on deposit:
 - died on ____/____/____
 - lacks legal capacity
 - is no longer an active member of the State Bar.
- 4) The above listed documents do not include any will or codicil for which the maker is known to be deceased.
- 5) More than 90 days have elapsed since the giving of said notice. As of this date, the owner has failed to claim the documents and it is now requested that the clerk accept the deposit of the estate planning documents.
- 6) I acknowledge that I am required to mail notice of the transfer of the above documents to the State Bar under Probate Code § 733.

DATE

SIGNATURE

ACKNOWLEDGMENT OF RECEIPT

The estate planning document(s) listed herein has(have) been transferred to the Court Executive Officer of the Marin County Superior Court, pursuant to Probate Code § 732(c).

KIM TURNER, Court Executive Officer

By _____

DATE

DEPUTY

MARIN COUNTY SUPERIOR COURT

P.O. Box 4988
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GUIDELINES FOR USE OF THIS FORM

Only estate planning documents held by an attorney for safekeeping may be transferred to the Court Executive Officer of the Marin County Superior Court under Probate Code § 732.

The Court Executive Officer will collect \$20.00 per document transferred under this section.

The estate planning documents must be presented to a clerk of the Marin County Superior Court of the county of the depositor's last known domicile.

The following are the only documents which can be transferred with the clerk:

- 1) Signed original Will
- 2) Declaration of Trust
- 3) Trust Amendment
- 4) Other document modifying a Will or Trust
- 5) Signed original Power of Attorney
- 6) Signed original Nomination of Conservator
- 7) Any other signed original instrument that the attorney and depositor agree in writing to make subject to this part submitted together with the written instrument.

Mail to: MARIN COUNTY SUPERIOR COURT
ATTN: PROBATE
P.O. BOX 4988
SAN RAFAEL, CA 94913-4988