

Attorney or Party Without An Attorney (Name, Address, Telephone Number)	
Attorney for (Name):	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF SONOMA Civil & Family Law Courthouse/Probate Division 3055 Cleveland Avenue Santa Rosa, Ca 95403 Telephone: (707) 521-6500	
IN THE MATTER OF:	
Statement of Issues for Settlement Conference or Trial <input type="checkbox"/> Petitioner <input type="checkbox"/> Objector/Respondent	Case Number: Settlement Conference/Trial Date: Time: Department:

This coversheet must be submitted to the Probate Clerk's Office at 3055 Cleveland Avenue, Santa Rosa, California 95403; ten (10) calendar days before the settlement conference or, if no settlement conference, ten (10) calendar days before the trial date. A copy of this coversheet and of all attachments must be mailed to all parties and a Proof of Service must be filed with the original of this form.

DISPUTED ISSUES

*** Check items you and the other party do not (or may not) agree on ***

- | | | |
|--|--|--|
| <input type="checkbox"/> Accounting | <input type="checkbox"/> Undue influence | <input type="checkbox"/> Mistake |
| <input type="checkbox"/> Interpretation of Trust terms | <input type="checkbox"/> Fraud/misrepresentation | <input type="checkbox"/> Duress |
| <input type="checkbox"/> Modification of Trust terms | <input type="checkbox"/> Appointment of Executor/Trustee | <input type="checkbox"/> Attorney's Fees/Costs |
| <input type="checkbox"/> Other: _____ | | |

YOU ARE REQUIRED TO PROVIDE THE FOLLOWING INFORMATION (TYPE OR CLEARLY PRINT ANSWERS TO ALL APPLICABLE QUESTIONS ON SEPARATE PAPER AND ATTACH IT TO THIS COVERSHEET):

1. State the following statistical information:
 - A. Date of death: _____
 - B. List by date and describe any temporary orders or stipulations that are in effect:

2. Summarize issues that you believe have been settled and briefly describe the terms of settlement for each issue that you believe has been settled.

Case Name: _____

Case Number: _____

3. If attorney's fees are in dispute, please do the following:
 - A. Prepare and file a spreadsheet listing all fees as disputed or not disputed.
 - B. State your proposal for an order for attorney's fees.
 - C. State the factual and legal basis for your proposal.
4. Describe any significant disputed issues in your case not addressed above:

5. Attach copies of documents that may help settle disputes.
6. State your efforts to settle the issues outlined above and the dates that you met and conferred:

DATED: _____

Signature of: Petitioner; Objector/Respondent;
Petitioner's Attorney; Objector's/Respondent's Attorney

DATED: _____

Signature of: Petitioner; Objector/Respondent;
Petitioner's Attorney; Objector's/Respondent's Attorney

DATED: _____

Signature of: Petitioner; Objector/Respondent;
Petitioner's Attorney; Objector's/Respondent's Attorney

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Signature of: Petitioner; Objector/Respondent;
Petitioner's Attorney; Objector's/Respondent's Attorney

DATED: _____

Signature of: Petitioner; Objector/Respondent;
Petitioner's Attorney; Objector's/Respondent's Attorney

DATED: _____

Signature of: Petitioner; Objector/Respondent;
Petitioner's Attorney; Objector's/Respondent's Attorney

Continued on attachment