Forms Fixer

1412 17th Street., Suite 310F
Bakersfield, CA 93301
661 [redacted] (661-235-5425)

August 6, 2026

[redacted]
5415 Sierra Pine Ct.
Bakersfield, CA 93313

Re: Estate of [redacted] aka [redacted] - succession petition

Dear Mr. [redacted]

We looked through the documents you sent us. Several items appear worth checking before the hearing or any further filing. We listed them below in the order that may be most important.

Here are the items that may be worth checking:

- The DE-310 petition states that the decedent died intestate, that no will exists, and that the three petitioners are each entitled to a one-third interest. However, the later-uploaded estate-planning documents include a signed [redacted] Trust that names [redacted] as successor trustee and appears to identify [redacted] and [redacted] as beneficiaries. That document may materially conflict with the factual statements in the petition and should be reviewed immediately with a licensed probate attorney.

- The trust document contains a broad statement that the grantor placed all property owned by him into the trust, but the title records and Affidavit of Death show the real property in the decedent's individual name. The packet does not clearly show whether the residence was ever formally transferred to the trust. The relationship between the trust and the recorded title should be resolved before relying on either an intestate-succession theory or a trust-administration theory.

- The property address is not stated consistently. Several probate and appraisal documents use Bakersfield, CA 93311, while the real-estate listing agreement uses 93313 and the title profile uses 93311-2435. The correct postal ZIP code and the exact property description should be used consistently in future filings and sale documents.

- The DE-310 attachment states that the decedent lived at the property continuously from December 1996 until death and received all correspondence there. The title profile, however, lists a different mailing address. This may be explainable, but the residence and mailing-address statements should be checked for accuracy and consistency.

- The petition and inventory materials value the residence at $420,000, while the separate seller estimate reflects a contemplated sales price of approximately $399,000 and the listing agreement uses $420,000. Because these documents serve different purposes, the figures need not be identical, but the packet should clearly distinguish date-of-death appraisal value, listing price, and any proposed or estimated sale price.

- The accepted DE-310 packet states that 22 pages are attached, while the court-accepted PDF contains 24 pages in total. This may simply reflect exclusion of the two-page petition itself, but the attachment count should be checked against the exact court-filed version.

- The proof-of-mailing materials appear to consist primarily of envelope images addressed to the three petitioners. A completed proof-of-service section on DE-120 or another accepted proof form is not visible in the materials reviewed. Confirm that the required proof of notice has been completed and filed before the hearing.

- The documents contain Social Security information, signatures, email addresses, telephone numbers, residential addresses, death certificates, banking information, and other sensitive data. Copies intended for public filing or general distribution should be reviewed for required redaction, omission, or confidential filing treatment.

Please note: Forms Fixer is not a law firm, and our team members are not attorneys. This review is not legal advice. We looked only for apparent formatting, completeness, readability, and consistency issues in the documents. We did not determine whether the trust is valid, whether the residence is a trust asset, who is legally entitled to inherit, or which probate procedure should be used. Those questions should be reviewed promptly by a licensed probate attorney.

Forms Fixer is happy to help make clerical corrections, organize the documents, and prepare a corrected filing at your specific direction or at the direction of an attorney. Please call us at 661 [redacted] (661-235-5425) if you would like our help.

Sincerely,

[redacted]
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P.S. I thought a checklist might help you, so I've added one at no extra charge.

[ ] Have a licensed probate attorney review the trust before the hearing.
[ ] Determine whether the residence was ever transferred to or otherwise became an asset of the trust.
[ ] Confirm whether the petition's intestacy and one-third-share allegations remain accurate.
[ ] Use one consistent property address and ZIP code.
[ ] Reconcile the residence address with the separate mailing address shown in the title profile.
[ ] Label appraisal value, listing price, and estimated sale price clearly and separately.
[ ] Confirm the DE-310 attachment count.
[ ] Complete and file an acceptable proof of notice before the hearing.
[ ] Redact confidential information from public or broadly distributed copies.