

ALPERSTEIN, SIMON, FARKAS, GILLIN & SCOTT, LLP

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7 **SUPERIOR COURT OF CALIFORNIA, COUNTY OF LOS ANGELES**

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9 CONSERVATORSHIP OF THE PERSON
AND ESTATE OF

10 ,

11 NAME,

12 Conservatee.

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CASE NO.: ZE

JUDGE LISA R. JASKOL

**PETITION FOR APPROVAL OF
PROPOSED SETTLEMENT AND FOR
ORDERS TO ESTABLISH AND FUND
PURSUANT TO PROBATE CODE
SECTION 2580:**

- (1) **A SUB-TRUST ACCOUNT WITH A POOLED TRUST FOR CONSERVATEE UNDER THE Z POOLED TRUST WITH DISCRETIONARY AUTHORITY TO HIRE INVESTMENT ADVISOR WITH DISCRETIONARY TRADING AUTHORITY;**
- (2) **DISCRETIONARY AUTHORITY AS APPOINTED AGENT TO ESTABLISH AN ABLE ACCOUNT FOR THE BENEFIT OF CONSERVATEE; AND**
- (3) **FOR DISCRETIONARY AUTHORITY FOR THE TRUSTEE TO FUND CONSERVATEE'S ABLE ACCOUNT ANNUALLY FROM THE Z POOLED TRUST ACCOUNT UP TO THE MAXIMUM AMOUNT ALLOWED AND MAINTAIN CONSERVATEE'S PUBLIC BENEFITS**

Date: December 17, 2021
Time: 8:30 a.m.
Dept: 103

The Petition For Approval of Proposed Settlement and for Orders To Establish And Fund

ALPERSTEIN, SIMON, FARKAS, GILLIN & SCOTT, LLP

1 Pursuant To Probate Code Section 2580; (1) A Sub-Trust Account With A Pooled Trust For
 2 Conservatee Under The Z Pooled Trust With Discretionary Authority To Hire Investment
 3 Advisor With Discretionary Trading Authority; (3) Discretionary Authority As Appointed Agent
 4 To Establish An Able Account For The Benefit Of Conservatee; and (4) For Discretionary
 5 Authority For The Trustee To Fund Conservatee’s Able Account Annually From The Z Pooled
 6 Trust Account Up To The Maximum Amount Allowed And Maintain Conservatee’s Public
 7 Benefits, came on regularly for hearing On December 17, 2021, in Department 103, the
 8 Honorable _____, Judge presiding. _____, a member of the law firm of
 9 _____ appeared as special counsel for the Conservatee, _____.
 10 appeared on behalf of the Conservator, and _____, appeared on behalf of the
 11 Conservatee. The Court, after examining the petition and hearing the evidence, finds that all
 12 notices of the hearing have been given as required by law, and that all of the allegations in the
 13 petition are true, and good cause appearing therefor:

IT IS HEREBY ORDERED THAT:

- 14 1. The Court approves Petitioner’s request for Conservator to approve the Proposed
 15 Settlement offer, on behalf of the Conservatee re claims pending in LASC Case No.
 16 _____;
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- 18 2. There is hereby established a Sub-Trust Account with a Pooled Trust for
 19 Conservatee under The Z Pooled Trust with Discretionary Authority to invest in the
 20 Conservative Income Portfolio pursuant to the terms of the Joinder Agreement attached to the
 21 Petition;
- 22 3. _____ is appointed Guardian Ad Litem for Conservator with
 23 discretionary authority to establish and maintain in all respects an ABLE account for
 24 Conservatee;
- 25 4. The Trustee of the Z Pooled Trust is granted discretionary authority to fund
 26 Conservatee’s ABLE account annually from Conservatee’s Z Pooled Trust Sub-Account up to
 27 the maximum amount allowed and maintain Conservatee’s public benefits;
- 28 5. The Trustee of the Z Pooled Trust is ordered subject to the jurisdiction of this

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Court as respects the Conservatee’s Z Pooled Trust Sub-Account established hereby; and

6. The Court orders bond for the Trustee of the Z Pooled Trust, in the amount of \$ _____ (_____ Dollars).

APPROVED AS TO FORM AND CONTENT

, Attorney for
_____, Conservatee

, Attorney
For _____, Conservator

DATED: _____

JUDGE OF THE SUPERIOR COURT

ALPERSTEIN, SIMON, FARKAS, GILLIN & SCOTT, LLP