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| ATTORNEY OR PARTY WITHOUT ATTORNEY ( <i>Name, State Bar Number and Address</i> ):<br><br>TELEPHONE NO: _____ FAX NO. ( <i>Optional</i> ): _____<br>E-MAIL ADDRESS ( <i>Optional</i> ): _____<br>ATTORNEY FOR ( <i>Name</i> ): _____ | FOR COURT USE ONLY |
| <b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN JOAQUIN</b><br>STREET ADDRESS: 315 W. ELM STREET<br>MAILING ADDRESS: 315 W. ELM STREET<br>CITY AND ZIP CODE: LODI, CA 95240<br>BRANCH OF NAME: LODI                                  | CASE NUMBER: _____ |
| IN THE MATTER OF ( <i>Case Name</i> ): _____  | _____              |
| <b>FINANCIAL DOCUMENT(S) COVER SHEET</b><br><b>Probate Code § 2620(c), Local Rule 4-121</b>   |                    |

**NOTICE TO PETITIONER:** Documents must be LOOSELY BOUND, not stapled.

1. Personal Representative, Conservator, Guardian, or Trustee providing the attached documents:

Name: \_\_\_\_\_ Telephone Number: \_\_\_\_\_  
 Address: \_\_\_\_\_

2. Number of pages, including this cover sheet, being submitted: \_\_\_\_\_

3. Each attached document is (complete a, b, or c):  
 (Use a separate cover sheet if lodging multiple types of documents (i.e. printed originals, electronic originals, or copies.)

- a. A printed original. I received each attached document in printed form from the issuer (court, county recorder's office, escrow company, payor, institution, financial institution, etc.), and have provided the original document without alteration.
- b. An electronic original. I received each attached document in electronic form from the issuer (court, county recorder's office, escrow company, payor, institution, financial institution, etc.), and have provided the original document without alteration.
- c. A photo copy. If submitting a copy of any document other than a deed or a check, a declaration must be filed concurrently with this cover sheet per Local Rule 4-121B.

4. I have submitted this document with  a self-addressed envelope with postage for the court to return the documents by mail to the address indicated in the header of this document  a pick-up slip for petitioner or attorney service.

I declare under penalty of perjury that the documents lodged with this cover sheet are the originals or copies as noted above.

Date: \_\_\_\_\_  
 \_\_\_\_\_  
SIGNATURE (PERSONAL REPRESENTATIVE, CONSERVATOR, GUARDIAN, or TRUSTEE)