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Sheila de la Guerra General Public Comment

From: Patty Pagaling <protectmatilija@gmail.com>
Sent: Monday, July 17, 2023 4:54 PM
To: sbcob
Subject: in support of releasing funds to the beneficiaries of the Rosen Estate

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Dear Santa Barbara County Board of Supervisors,

I am writing to express support for Bryan Rosen, who has spoken with you regarding the questionable actions of the trustee for his family's estate. The trustee hasn't released funds to beneficiaries who truly need the money.

I was with Bryan when the trustee was speaking with Bryan on June 1st, on the phone (which was on loudspeaker). I heard the trustee say (on the phone) that he would be releasing money within a month, and that it would be a substantial amount. He said Bryan would be happy with the amount. The month has come and gone, and now the trustee is still stalling, and has not released any funds.

Many of us who are friends of the beneficiary are asking for your help to encourage the trustee to do the right thing and release the money to the beneficiaries immediately.

We are concerned that the trustee is not acting in the best interest of the beneficiaries which is required by law.

Sincerely,

Patty Pagaling

More information regarding the Rosen Estate and the trustee, Mr. Will Jones:

It's been almost two years since the beneficiaries' mother passed, and not even a small advance on the inheritance has been released. Escrow of the family home closed about two months ago.

Bryan Rosen is in desperate need of some funds, and is living out of his car. He spent his own money on his mother's care during the last part of her life, and wasn't reimbursed for any of his time and expenses. He also fixed up the property for sale, and emptied the house, without reimbursement.

Before the property was sold, Mr. Jones seemed to regard the family home as a teardown. His attorney, Mr. Fox represented to the court that the property was a teardown. However, both the property inspector and appraiser said otherwise in emails.

It also seems that Mr Jones and his lawyer were trying to turn the property into a teardown by neglecting the roof. On the court transcript of January 5, 2023, Mr. Fox states it was the first time they had heard of there being a problem with the roof. Mr. Jones stood next to Mr. Fox in court and said nothing.

In fact, the beneficiary's attorney refuted this statement in court, and pointed out the court had received documents informing the trustee of the leaky roof. The beneficiary had informed the trustee about the roof many times. In addition, there was a letter from Martin Roofing Company, which indicated the company had come to the house in 2018 in response to reports of leakage, and more recently as well. The property inspection report also mentioned the need to replace the roof, and indications of leakage.

Thankfully, Judge Colleen Sterne insisted the roof be repaired.

Why would the trustee want to sell the property for a low price, and neglect the property's upkeep?

From what I understand:

The trustee has been delinquent in paying bills for the estate, incurring late fees.

The trustee was also delinquent in quarterly court required accounting for 2 years!

The trustee did not respond to the beneficiary's request for information as to how much money was left in the estate.

The trustee was also very delinquent in releasing the property inspection report.

Due to these actions, along with other actions that indicate alleged misconduct by the trustee, we are concerned that Mr. Jones is not acting in the best interest of the beneficiaries which is required by law.