SARA FORKENBROCK-SKOUSEN

310-699-7247 or 415-905-0139

www.pfservices.net - sara@pfservices.net

CURRICULUM VITAE

SERVICES PERFORMED

Trust and Probate Estate Administration, Conservatorships of the Person & Estate, Power of Attorneys, Bill Pay Assistant/Daily Money Management, and Expert Witness testimony and consulting relating to standards of care for fiduciaries (Cal. Prob. Code §§ 16000–16015; and §§ 16045–16054).

FIDUCIARY PRACTICE PROFILE

Sara is a private Professional Fiduciary licensed by the California Professional Fiduciary Bureau and is also a National Certified Guardian. As a former Trust and Estate Paralegal, Sara has over 25 years of experience in guiding clients through the Trust and Probate Administration process and in the worst-case scenario, the litigation process. If litigation is involved, Sara is highly focused on resolving a contentious litigation verses spending valuable trust and estate resources litigating matters to the potential detriment to the beneficiaries.

Sara works closely with businesses, seniors, disabled persons, settlors, trustees and other individuals who cannot or who are unwilling to manage their own personal and financial affairs. Sara provides personal and comprehensive assistance to her clients by providing day-to-day care management and handling of the client's financial matters, tax matters, investments, and real estate transactions.

Sara has built a solid network of professionals to assist her in any situation. Having long standing relationships with accountants, attorneys, real estate brokers and other professionals provide Sara with a wealth of resources, knowledge, and support to draw upon when needed. This network helps navigate various challenges, stay updated on industry trends, and access specialized expertise when necessary.

EXPERT WITNESS TESTIMONY or CONSULTATIONS

Sara also provides expert witness testimony and/or consultations relating to fiduciary duties, standards and practices. This includes duties of loyalty, impartiality, prudent administration, accounting, and trust asset management. Evaluated trustee conduct, investment decisions, distributions, conflicts of interest, and compliance with statutory and common law standards of care. Reviewed trust accountings, financial records, and administrative practices to assess adherence to professional fiduciary standards.

PROFESSIONAL EXPERIENCE

- Experience in all aspects of the Probate and Trust Administration process including but not limited to, knowledge of the probate code governing both the probate and trust administration process and standards of care, marshalling assets, pour-over wills, filing probate and spousal petitions, statutory notices and timelines, creditor's claims, assignments, waivers and/or annual accountings, sale of real property, and the funding and distributions to heirs; and
- Extensive knowledge Cal. Probate Code §850 et seq., (Petitions relating to real or personal property); §17200 (Petition for Instructions); Welfare & Institutions Code §15600 et seq. (Petitions and/or litigation relating to elders and dependent adult abuse); and standards of care for fiduciaries (Cal. Prob. Code §§ 16000–16015; and §§ 16045–16054).

LICENESES and PROFESSIONAL MEMBERSHIPS

California Professional Fiduciary – license number 1414
Professional Fiduciary Association of California (PFAC) and National Guardian Association
Beverly Hills Bar Association – Trust and Estates section
National Guardian Association

EDUCATION

California State University San Marcos- Bachelor of Arts, Economics 1995