

PROBATE TRACKING SHEET



DATE: 09/04/2025

DECEASED NAME: Albert Johnese

PR NAME: Monique Michelle Dogan

FILE #: P25-01567

PR ADDRESS: 14054 Reed Ave, San Leandro, CA, 94578

ATTORNEY NAME: Kerrendeep Kaur Archuleta

PR TYPE: Administrator

PR PHONE #: 415-756-2298

ATTORNEY PHONE #: 343261

PR EMAIL: 415chic94124@gmail.com

ATTORNEY EMAIL: info@ccapclaw.com

PR COURT DATE: 09/04/2025.

ESTATE ADDRESS: 58 Las Moradas Cir

ESTIMATED VALUE: 336100

ESTATE CITY: San Pablo, CA, 94806

ESTIMATED BALANCE: Not Available

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/08/2025

DECEASED NAME: Jonathan Okorley

PR NAME: Juliana Vd Okorley

FILE #: P25-01576

PR ADDRESS: 1364 Oak Crest Ct, Antioch, CA, 94531

ATTORNEY NAME:

PR TYPE: Administrator

PR PHONE #: 818-471-3759

ATTORNEY PHONE #:

PR EMAIL: okorley@tmail.net

ATTORNEY EMAIL:

PR COURT DATE: 09/08/2025.

ESTATE ADDRESS: 1364 Oak Crest Ct

ESTIMATED VALUE: 976500

ESTATE CITY: Antioch, CA, 94531

ESTIMATED BALANCE: Not Available

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/04/2025

DECEASED NAME: Lawrence Visnick

PR NAME: Anne Visnick

FILE #: 25PR200778

PR ADDRESS: 1360 American Way, Menlo Park, CA, 94025

ATTORNEY NAME:

PR TYPE: Decedent'S Estate

PR PHONE #: 408-480-9166

ATTORNEY PHONE #:

PR EMAIL: aervisnick@gmail.com

ATTORNEY EMAIL:

PR COURT DATE: 09/04/2025.

ESTATE ADDRESS: 5082 Cribari Blfs

ESTIMATED VALUE: 537500

ESTATE CITY: San Jose, CA, 95135

ESTIMATED BALANCE: Not Available

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/05/2025

DECEASED NAME: Young Lee

PR NAME: Andrew Lee

FILE #: 25PR003015

PR ADDRESS: 2275 Nwraleigh St Unit 402, Portland, OR, 97210

ATTORNEY NAME: Jonathan G Stein

PR TYPE: Administrator

PR PHONE #: 505-440-1506

ATTORNEY PHONE #: 224609

PR EMAIL: andrewlhy@gmail.com

ATTORNEY EMAIL:

PR COURT DATE: 09/05/2025.

ESTATE ADDRESS: 7240 Catboat Circle

ESTIMATED VALUE: 430100

ESTATE CITY: Citrus Heights, CA, 95621

ESTIMATED BALANCE: No

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/05/2025

DECEASED NAME: Erika Hoffman

PR NAME: John Hoffman

FILE #: 25PR003026

PR ADDRESS: 328 Garcia Avenue, Half Moon Bay, CA, 94019

ATTORNEY NAME: Grace S Johnson

PR TYPE: Administrator

PR PHONE #: 415-509-1474

ATTORNEY PHONE #: 303607

PR EMAIL:

ATTORNEY EMAIL: grace@smithandjohnsonlaw.com

PR COURT DATE: 09/03/2025.

ESTATE ADDRESS: 6241 Riverside Blvd #210

ESTIMATED VALUE: 269300

ESTATE CITY: Sacramento, CA, 95831

ESTIMATED BALANCE: No

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/08/2025

DECEASED NAME: Jean Marie Suwyn

PR NAME: Chris Suwyn

FILE #: 25PR003028

PR ADDRESS: 4730 Sundance Court, Loomis, CA, 95650

ATTORNEY NAME:

PR TYPE: Administrator

PR PHONE #: 916-792-6768

ATTORNEY PHONE #:

PR EMAIL:

ATTORNEY EMAIL:

PR COURT DATE: 09/07/2025.

ESTATE ADDRESS: 4840 Dover Ln Unit 405

ESTIMATED VALUE: 282100

ESTATE CITY: Sacramento, CA, 95842

ESTIMATED BALANCE: No

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/08/2025

DECEASED NAME: Esther E Jiron

PR NAME: William C Hayman

FILE #: 25PR003029

PR ADDRESS: Po Box 2683, Rocklin, CA, 95677

ATTORNEY NAME:

PR TYPE: Administrator

PR PHONE #: 916-257-6356

ATTORNEY PHONE #:

PR EMAIL:

ATTORNEY EMAIL:

PR COURT DATE: 09/05/2025.

ESTATE ADDRESS: 6039 34Th Ave

ESTIMATED VALUE: 324600

ESTATE CITY: Sacramento, CA, 95824

ESTIMATED BALANCE: No

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/09/2025

DECEASED NAME: Richard Joseph Conter

PR NAME: Kathy Conter

FILE #: 25PR003064

PR ADDRESS: 8322 Big Oak Dr, Citrus Heights, CA, 95610

ATTORNEY NAME:

PR TYPE: Administrator

PR PHONE #: 916-883-6363

ATTORNEY PHONE #:

PR EMAIL:

ATTORNEY EMAIL:

PR COURT DATE: 09/08/2025.

ESTATE ADDRESS: 128 Sierra Woods Circle

ESTIMATED VALUE: 535100

ESTATE CITY: Folsom, CA, 95630

ESTIMATED BALANCE: No

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/08/2025

DECEASED NAME: Chivas Dornell Henderson

PR NAME: Jaime Laura Hale

FILE #: 25PR003068

PR ADDRESS: 6912 Pin Oak Ct, Fair Oaks, CA, 95628

ATTORNEY NAME: Nancy E Miller

PR TYPE: Executor **PR PHONE #:** 916-839-7437

ATTORNEY PHONE #: 303184

PR EMAIL:

ATTORNEY EMAIL:

PR COURT DATE: 08/28/2025.

ESTATE ADDRESS: 6912 Pin Oak Ct

ESTIMATED VALUE: 465800

ESTATE CITY: Fair Oaks, CA, 95628

ESTIMATED BALANCE: No

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/09/2025

DECEASED NAME: Warren E Anzelc

PR NAME: Cheryll Van Ness-Anzelc

FILE #: 25PR141467

PR ADDRESS: 4369 Amador Rd, Fremont, CA, 94538

ATTORNEY NAME: Harald Westendorf

PR TYPE: Administrator

PR PHONE #: 510-648-7357

ATTORNEY PHONE #: 88323

PR EMAIL: jmsinfl@gmail.com

ATTORNEY EMAIL: harald@hwestlaw.com

PR COURT DATE: 09/07/2025.

ESTATE ADDRESS: 4369 Amador Rd

ESTIMATED VALUE: 1522800

ESTATE CITY: Fremont, CA, 94538

ESTIMATED BALANCE: Yes

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/08/2025

DECEASED NAME: Larissa Charnsangavej

PR NAME: Jeremy Sheng

FILE #: 25PR142149

PR ADDRESS: 5119 Evergreen St, Bellaire, TX, 77401

ATTORNEY NAME: Lauren Disston

PR TYPE: Administrator

PR PHONE #: 214-686-1122

ATTORNEY PHONE #: 212039

PR EMAIL: sheng.jeremy@gmail.com

ATTORNEY EMAIL: lauren@cdtrustlaw.com

PR COURT DATE: 09/03/2025.

ESTATE ADDRESS: 1082 16Th St

ESTIMATED VALUE: 452300

ESTATE CITY: Oakland, CA, 94607

ESTIMATED BALANCE: No

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/05/2025

DECEASED NAME: Francis Earl Espinoza

PR NAME: Jennifer

Carlos Marquez

FILE #: PR-25-000965

PR ADDRESS: 404 N Conejo Ave, Modesto, CA, 95354

ATTORNEY NAME: Romelia Dede Soto

PR TYPE: Decedent's Estate **PR PHONE #:** 209-281-7175

ATTORNEY PHONE #: 202617

PR EMAIL: mrsmarquez143@gmail.com

ATTORNEY EMAIL: dede@thesotolawgroup.com

PR COURT DATE: 09/05/2025.

ESTATE ADDRESS: 1533 Higbee Dr

ESTIMATED VALUE: 420200

ESTATE CITY: Modesto, CA, 95350

ESTIMATED BALANCE: Not Available

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/10/2025

DECEASED NAME: Vincent Wong

PR NAME: Vincent N Wong Jr

FILE #: 25-PRO-01249

PR ADDRESS: 33 Muirwood Dr, Daly City, CA, 94014

ATTORNEY NAME: Warren T Woo

PR TYPE: NA **PR PHONE #:** 650-763-7592

ATTORNEY PHONE #: 121168

PR EMAIL:

ATTORNEY EMAIL: WARRENTWOOTESQ(mCS.COM

PR COURT DATE: 07/01/2025.

ESTATE ADDRESS: 33 Muirwood Drive

ESTIMATED VALUE: 952900

ESTATE CITY: Daly City, CA, 94014

ESTIMATED BALANCE: No

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/05/2025

DECEASED NAME: Mary L Hopkins

PR NAME: Charline Lynn Terry

FILE #: 25STPB10081

PR ADDRESS: 493 E 3550 N, Ogden, UT, 84414

ATTORNEY NAME: William Richard Remery

PR TYPE: NA **PR PHONE #:** 661-755-9740

ATTORNEY PHONE #: 89897

PR EMAIL: charlineterry@yahoo.com

ATTORNEY EMAIL: wremery@aol.com

PR COURT DATE: 09/05/2025.

ESTATE ADDRESS: 9862 Cima Mesa Rd

ESTIMATED VALUE: 419900

ESTATE CITY: Littlerock, CA, 93543

ESTIMATED BALANCE: Not Available

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.

PROBATE TRACKING SHEET



DATE: 09/09/2025

DECEASED NAME: Janelle Rene Flynn

PR NAME: Liam Flynn

FILE #: 25PR01032

PR ADDRESS: 701 La Verne Ave, Santa Rosa, CA, 95404

ATTORNEY NAME: Zachary Arthur Carroll

PR TYPE: Administrator

PR PHONE #: 707-596-1492

ATTORNEY PHONE #: 260916

PR EMAIL: ljflynn008@gmail.com

ATTORNEY EMAIL: zcarroll@andersonzeigler.com

PR COURT DATE: 09/09/2025.

ESTATE ADDRESS: 701 La Verne Ave

ESTIMATED VALUE: 646700

ESTATE CITY: Santa Rosa, CA, 95404

ESTIMATED BALANCE: Not Available

[Ring... Ring...]

Hi [NAME] this is [YOUR NAME] with [COMPANY], calling regarding probate file [case #] for the estate of [deceased name], is now a bad time for a brief chat?

IF YES:

I completely understand. I'll give you a call back at the end of the day, say 6:30ish—unless tomorrow is better for you.

Great! I'll send you a text reminder 30 minutes prior, thank you [name], talk to you then. Take care.

IF NO:

Great, I'll be brief yet informative, I understand [pr court date] is your hearing to be approved as the [admin/exe], is that how you understand it?

Perfect. You also understand—after the hearing and you're approved, you'll be issued certified letters which give you legal authority to convert assets to their monetary equivalent, you just won't be able to distribute any funds yet. I'm sure your attorney explained that.

The reason I'm calling pertains to the real estate included in the probate. You may or may not have plans to sell the estate home, but I'm sure you agree its better to know and not need it than need it and not know—so Im going to email you our probate real estate resource guide that outlines in detail everything involved in selling real estate during probate, it's free, there isn't any obligation and you'll be prepared when the time comes. Do you use gmail?

COLD CALL SCRIPT

[Be Sure You Check the DNC List]

Any TCPA Violation(s) falls directly on the individual agent.