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STATE OF INDIANA ) IN THE PORTER SUPERIOR COURT

COUNTY OF LAKE ) VALPARAISO, INDIANA

IN THE MATTER OF THE )
RHODA M. SHEARS TRUST ) CAUSE NO. 64D01-1105-TR-4423

DATED FEBRUARY 17, 1992 )

## PETITION TO DOCKET TRUST AND APPOINT SUCCESSOR TRUSTEE

Donald W. O'Brien, petitioner herein, shows the Court as follows:

- 1. Kathleen R. O'Brien died testate on February 3, 2010, and at the time of her death was domiciled in Porter County, Indiana.
  - 2. He is the surviving spouse of Kathleen R. O'Brien.
- 3. The Rhoda M. Shears Trust dated February 17, 1992, is the record owner of title to certain real estate in Lake County, Indiana, commonly known as 2944 165th Street, Hammond, Indiana, 46323, and more particularly described as:

Lots 6 and 7 in Block 1, in Hessviller Gardens, a Subdivision in the City of Hammond, as per plat thereof, recorded in Plat Book 16, page 27, in the Office of the Recorder of Lake County, Indiana.

by way of a Quit Claim Deed signed by Rhoda M. Shears to Rhoda M. Shears, Trustee under Agreement dated February 17, 1992 and Recorded April 10, 1992, in Lake County, Indiana, as Document No. 92021930. A copy of the Declaration of Trust is attached hereto.

- 4. Rhoda M. Shears died on October 22, 2003.
- 5. Kathleen R. O'Brien was the named successor trustee of the Rhoda M. Shears Trust dated February 17, 1992.
- 6. Kathleen R. O'Brien died on February 3, 510, LeEin no successor trustee.
- 7. The original trust beneficiary was Kathleen R. O'Brien PEGGY HOLINGA KATONA Contingent beneficiaries are the per stirpes AKE COUNTY AUDITOR

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Kathleen R. O'Brien, being her children, namely: Janice O'Brien Stone, Mary O'Brien, Scott O'Brien, Lester O'Brien, Lewis O'Brien, Donald W. O'Brien, Jr., and Patricia O'Brien Solarczyk.

- 8. The real estate which was conveyed to the trust has been sold.
  - 9. There is no living trustee.
- 10. Petitioner requests the docketing of the trust for the purpose of appointing a successor trustee so the real estate can be conveyed to the buyer.
- 11. Petitioner requests that he be appointed as successor trustee of the Rhoda M. Shears Trust dated February 17, 1992.
- 12. He is a person qualified to act as successor trustee, in that he is the surviving spouse of the last named trustee and is familiar with the records she maintained regarding the trust.

WHEREFORE, Tetitioner prays the Court for an order docketing the Rhoda M. Shears Trust dated February 17, 1992, appointing Donald W. O'Brien as successor trustee of said trust, and for all other just and proper relief in the premises.

DONALD W. O'BRIEN

I verify under the penalties for perjury that the above and foregoing representations are true.

MARGARET ROYCE GALVIN 7039-45

5930 Hohman Avenue Hammond, Indiana 46320 219-933-4715

Attorney for Petitioner Donald W. O'Brien

IN TESTIMONY that the foregoing is a true copy taken from the records of Porter Circuit / Superior Court Karen M Martin, Clerk thereof set my hand and affix the Seal of Said Court.

This day of This is 2011

This day of The 20 11

CLERK
CIRCUIT / SUPERIOR COURTS COUNTY OF PORTER, INDIANA
By Court Clerk

WHEREAS, I, RHODA M. SHEARS, of the City of Hammond, County of Lake, State of Indians, am the owner in fee simple of certain real estate in said county known as 2944 165th Street, Hammond, Indiana 46323, which real estate is described more fully in the Deed conveying it from JOHN N. THOMPSON and ELLA THOMPSON, Husband and Wife, to KENNETH M. SHEARS and RHODA M. SHEARS, Husband and Wife, as

> Lots 6 and 7 in Block 1, in Hessville Gardens, a Subdivision in the City of Hammond, as per plat thereof, recorded in Plat Book 16, page 27, in the Office of the Recorder of Lake County, Indiana.

Being the premises earlier conveyed to the Settlor by an instrument dated March 6, 1946, and recorded as Document 214163 in Deed Records of the Lake County Recorder.

NOW, THEREFORE, KNOW ALL THESE PRESENTS, that I do hereby acknowledge and declare that I hold and will hold said real estate and all my the Lake County Recorder!
rights, title and interest in and to said property and all furniture, fixtures and personal property situated therein on the date of my death, IN TRUST:

1. For the use and benefit of my child, KATHLEEN R. O'BRIEN. If because of my physical or mental incapacity certified in writing by a physician, the Successor Trustee hereinafter named shall assume active administration of this trust during my lifetime, such Successor Trustee shall he fully authorized to pay to me or disburse on my behalf such sums from income and principal as appear necessary or desirable for my welfare. Upon my

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death, unless a beneficiary shall predecease me, my Successor Trustee is hereby directed forthwith to sell said real estate and distribute the sale proceeds unto the beneficiaries in equal shares, per stirpes and thereby terminate this TRUST; provided, however, that if any beneficiary hereunder shall not have attained the age of twenty-one (21) years, the Successor Trustee shall hold such beneficiary's share of the trust assets in continuing trust until such beneficiary shall have attained the age of twenty-one (21) years. During such period of continuing trust the Successor Trustee in her absolute discretion, may retain the specific trust property herein described if she believes it in the best interest of the Beneficiary so to do, or she may sell or otherwise dispose of such specific trust property, investing and reinvesting the proceeds as she may deem appropriate. Payments hereunder by the Successor Trustee may be made to the person with whom said minor beneficiary resides without the intervention of a guardian.

- 2. The beneficiaries hereunder shall be liable for their proportionate share of any taxes levied upon my total taxable estate by reason of my death. the Lake County Recorder!
- 3. All interests of beneficiaries hereunder shall be inalienable and free from anticipation, assignment, attachment, pledge or control by creditors or by a present or past spouse of any such beneficiary in any proceeding in law or equity.
- 4. I reser e the right during my lifetime (a) to place a mortgage or other lien upon said property and (b) to collect any rental or other income which may accrue from the trust property and to pay such income to myself. I shall be exclusively entitled to all income accruing from the trust property during my lifetime and no beneficiary named herein shall have any claim upon any such income and/or profits distributed to me.

- 5. I reserve the power and right during my lifetime to amend or revoke in whole or in part the trust hereby created without the necessity of obtaining the consent of any beneficiary. The sale or disposition of the whole or any part of the property shall constitute as to such whole or part a revocation of this trust.
- 6. I reserve the right to designate new or additional beneficiaries hereunder.
- 7. In the event of my physical or mental incapacity certified in writing by a physician, I appoint KATHLEEN R. O'BRIEN as Successor Trustee.
  - 8. Upon my death, KATHLEEN R. O'BRIEN, shall succeed me as Trustee.
- 9. This Declaration of Trust shall extend to and be binding upon the heirs, executors, administrators and assigns of the undersigned and upon any Successor Trustee.
  - 10. I and any Successor Trustee shall serve without posting bond.
- 11. This Declaration of Trust shall be construed and enforced in accordance with the laws of Indiana. the property of

IN WITNESS WHEREOF, I have signed this Declaration of Trust

on 2-17

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Thosa M. Shears

RHODA M. SHEARS

R. T. MOORE, Notary Sublic Lake County Resident

Commission Expiration: 8/3/92

This instrument prepared by: Attorney Roger T. Moore, P.C., #9289-64 6195 Central Avenue, Portage, IN 46368

(219) 762-0402

2011.

ECRTER SUPERIOR COURT