### MAUREEN I'ANSON

CAUGE NUMBER 3479

MINOR		XX INCOMPETENT	PERSON	ESTATE		-	
GUARDIAN	The state of the s		ATTORNEY				
	# No. of Paint 1986 No. 95 halfoldscoker		Rot	ert R. Beeze	Residence is a second description of the second description of the		s
5/2/75	REC	EIVED OF:  Robert R. Beez	zer		FE	32.	<u> </u>
	REG	ISTRY		DISBURSED	RECEI	VED	- 1
	Market San Co.						
						on the same of the	Lance Control
		takan lakura saman sa tagan tangga kalaban kalaban sa sa kalaban sa kalaban kalaban kalaban kalaban kalaban sa					FM: 1 1-8-1
DATE	SUB.	MEMORANIC	NIM DE BRICEEN	NEE	REEL	FRAM	
5/2/75	1	Petition for app	oun of Proceed		N-L-L	, RAI	
5/2/75	2	Notice of hearin		Guire			
5/20/75	3	Acknowledgement					
5 <b>/2</b> 0/ <b>7</b> 5	4	Notice of appeara	ance				-
5/23/75	5	Order setting ca	se on 10/16/7	75	**************************************		-4,
5/23/75	6	Court check list	ork and the residue and a second of the second second residue.	the second standard and second standard			Pillan alfia
5/23/75	1	Entered, continu		<b>7</b> 5	prob	cal	
9/5/75	7	Not. of Deposition				No A. b	- 10
9/8/75	8	Subpoena duces t					
9/8/75	9	Subpoena duces	tecum		ال اب		- /

SUPERIOR COURT - KING COUNTY - WASHINGTON

GUARDIANSHIP APPEARANCE DOCKET

1 1		· ·		prophological consequences in
DATE	508. HO	MEMIDRANDUM OF PROPESOINTS	DEE.	:FRAME
9/8/75	10	Subp <b>oena</b>		· INITI TOPPING
9/8/75	11	Subpoena		
9/8/75	12	Affidavits of service		:
9/17/75	13	of trial Stipulation and order for consolidation		: :
10/15/75	14	Affidavit of service		
10/15/75	15	Affidavit of service		
10/15/75	16	Affidavit of service		
10/16/75	17	Petitioner's memorandum		
10/16/75	18	Incompetent's memorandum		
10/16/75	19	Court check list		************************
10/16/75	1	Entered hearing, petition for appointment o	E	
		Hon. Donald Horowitz Gdn. is dismissed. reporter Robert Carlton	1985	786
10/16/75	1	Entered hearing, referred to P.J. Dept.	prob	cal
10/21/75	20	Judgment of order denying letters without	640	1186
		prejudice to future applications, and of		
		payments and distribution		
11/21/75	. /	Reporter's notes, Vol:421, R. D. Carlton		

SUPERIOR COURT - KIND COURTY - WASHING TOO. CO. CO. CO.

### 75 MAY 2 PH 2:20

LETTY J. MULLEN CLERK KIKA COUNTY WA.

2

1

3

4

5

в

7

8

9

10

11

12

13 14

15 16

17

18 19

20 21

22

24

25

23

26 27

28

29

30

of MAUREEN I'ANSON,

In the Matter of the Guardianship )

An Incompetent.

IN PROBATE

PETITION FOR GUARDIAN OF **ESTATE** 

COMES NOW Thomas I'Anson and petitioning for the appointment of a guardian of the estate of Maureen I'Anson, shows the following:

IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON FOR KING COUNTY

- 1. Thomas I'Anson, the petitioner resides at 4014 Hunts Point Road, Bellevue, Washington and is the natural father of Maureen I'Anson.
- 2. Maureen I'Anson is of legal age and a resident of King County, Washington.
- 3. Maureen I'Anson is an incompetent person who is incapable of managing her property by reason of mental illness or by reason of other mental incapacity.
- No person is now qualified as quardian of the person or estate of Maureen I'Anson in the State of Washington or in any other jurisdiction.
- 5. Petitioner seeks the appointment of any bank or trust company doing business in the City of Seattle to be guardian of the estate provided the guardian appointed by this court will signify its willingness to act.
  - The persons, so far as known by petitioner, who are

2

1

3

(a)

- 4
- 5
- в
- 7
- 8
- 9 10
- 11
- 12
- 13
- 14
- 15
- 16
- 17
- 18 19
- 20
- 21
- 23 23
- 24
- 25
- 26 27
- 28
- 29

(b) Marilyn I'Anson (mother) 11141 N. E. 62nd Kirkland, Washington

Thomas I'Anson (father)

4014 Hunts Point Road Bellevue, Washington

- 7. Maureen I'Anson is not now in the care or custody of any person or institution.
- At a time when Maureen I'Anson was a minor, she was involved in an automobile accident in the State of Alaska. Maureen I'Anson sustained severe personal injury including the loss of function in each of her limbs in such accident. result of the injuries sustained and after lengthy legal proceedings including an appeal to the Supreme Court of Alaska, the petitioner and his attorneys were successful in recovering a sum in excess of one million dollars for and on behalf of Maureen I'Anson. The said settlement proceeds have been diminished by the payment of costs, attorneys fees and by the delivery of \$34,200 to Maureen I'Anson. The balance of the settlement proceeds are now invested in an interest bearing certificate of deposit under an agreement entered into March 25, 1975, by and between Maureen I'Anson, Thomas I'Anson and Pacific National Bank of Washington as trustee. Said trust agreement may be terminated or modified by agreement of the parties or by an order of this court.
- 10. Subject to certain claims of Thomas I'Anson for interest, reimbursement of expenses and for services rendered, the settlement proceeds constitute a fund which will be required to pay for the medical treatment, nursing care, support

and maintenance of Maureen I'Anson for the balance of her natural life.

11. Maureen I'Anson has consulted with spiritual advisors and others and believes that her medical condition will improve to the point where she will no longer be totally and permanently disabled. In accordance with these views and the religious convictions of Maureen I'Anson, she believes that the settlement proceeds, or at least \$540,000 of such proceeds, should be contributed to Community Chapel & Bible Training Center, a Washington non-profit corporation, located at 18635 8th Avenue South, Seattle, Washington. A contribution of the magnitude contemplated by Maureen I'Anson will cause her to become either a charge on the bounty of her relatives or a ward of the State, all in violation of petitioner's express purpose and understanding with Maureen I'Anson in obtaining an adequate personal injury settlement to assure the financial security of his daughter.

WHEREFORE, petitioner prays that the court appoint a suitable and proper guardian of the estate of Maureen I'Anson.

TAUSEND

BY:

SCHWEPPE, DOOLITELE

20

1

2

3

₫.

5

В

7

8

9

10

11

12

13

14

15

13

17

18

19

21

22

23 24

25

76 26

27

28

propriate to the Po

. . . . . . . . STATE OF WASHINGTON )
) SS.
COUNTY OF KING )

THOMAS I'ANSON, being first duly sworn on oath deposes and says: He is the petitioner named in the above matter; he has

SCHALLER STANDARD HARLES PRACTICAL AND A pro-LET OF BOTH HE HARLES AND A STANDARD AND STANDARD AND AND A STANDARD

Attorneys for Petitioner

1	read the within and foregoing Petition for Guardian of Estate,
2	knows the contents thereof and believes the same to be true.
3	A) (1)
4	THOMAS I'ANSON
5	THOMAS I PAGON
в	SUBSCRIBED AND SWORN to before me this 30 day of
7	<u>lpil</u> , 1975.
8	Mass III
9	NOTARY PUBLIC in and for the State
10	of Washington residing at Seattle.
11	
13	
13	
14	
15	
18	
17	
18	
19	
20	
21	
22	
23	
24	
25	
26	
27	
28	

Petition for Gdn. of Estate - page 4.

2.9

THE ACTUAL SAME THE ACTUAL TWO COLDS AND ACTUAL ACT

### 75 MAY 2 PH 2:20

	10 1751
1 2	LETTY J. MULLEN  CLERK  KILD COUNTY WAL
3 4	IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON
5	FOR KING COUNTY
в	
7	In the Matter of the Guardianship )  IN PROBATE
8	of ) NO.
9	MAUREEN I'ANSON, ) NOTICE OF APPLICATION FOR ) LETTERS OF GUARDIANSHIP
10	An Incompetent )
11	
12	A petition has been filed in this Court asking that letters
13	of guardianship be issued to any bank or trust company doing
14	business in the City of Seattle who has signified its willing-
15	ness to act, as guardian of the estate of the above named per-
16	son. Said petition will be heard on Mary 23 , 1975,
17	at 10:00 a.m. in the Probate Department of the above court,
	at which time any person interested may appear, file objections
	and contest the petition.
50	BETTY MULLEN, Clerk
sı	
S3 S2	BY: Deputy
	ROBERT R. BEEZER, of
25	SCHWEPPE, DOOLITTLE, KRUG, TAUSEND, BEEZER & BEIERLE 1600 Peoples Bank Building
86	Seattle Washington 98171
27	Attorneys for Petitioner
88	

Notice of Application for Letters of Guardianship

29

30

OWERFRED FOR STEELE FRANCE INCLUDED

 OWERFRED FOR STEELE FRANCE
 OWERFRED FOR STEELE FRANCE
 OWERFRED FOR STEELE
 OWERFRED FOR STEELE

DISTING.

BELLET & HEILBLE BETTI EL KING COUNT : 174.

> IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON FOR KING COUNTY

In the Matter of the Guardianship of IN PROBATE NO. G 4419 MAUREEN I'ANSON, ACKNOWLEDGEMENT OF SERVICE An Incompetent STATE OF WASHINGTON SS. COUNTY OF KING

MAUREEN I'ANSON, being first duly sworn on oath deposes and says:

That she is the person above named and does hereby acknowledge receipt of one true and correct copy of notice of application for Letters of Guardianship and petition for guardian of estate on a date more than ten (10) days prior to May 23, 1975.

MAUREEN I'ANSON

SUBSCRIBED AND SWORN to before me this /4 day of May, 1975.

> NOTARY PUBLIC in and for the State of Washington residing at Seattle.

A HAVETPE TORRESTEE FOREST ALCOHOLD 131 ( 7) 12 (4 13) 11 17) 1

Acknowledgement of Service

1 2 3

5

в

8

9

10 11

12

13

14

15 18

17

18

19

20 21

22

23

24

25 23

27

28

29

30

PPE, DODLITTLE, KANS, TANSEND, 75 MAY 20 DEEZER & DEIVENLE 1.1. 2

1 2 BETTY J. H. LLEN KING COUNTY WA.

3

IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON FOR KING COUNTY

4 5

6

7

8

9

10 11

12

13 14

15

16

17

18 19

20

21

22

23

24

25 26

27

28 29

30

31

32

In the Matter of the Guardianship ) In Probate No. G-4419 of MAUREEN I'ANSON,

An Incompetent

NOTICE OF APPEARANCE

TO: Petitioner Thomas I'Anson and

TO: Robert R. Beezer, his attorney

YOU AND EACH OF YOU WILL PLEASE TAKE NOTICE that Maureen I'Anson hereby appears in the above entitled cause and requests that all further papers and pleadings herein, except original process, be served upon the undersigned Attorney at the address below stated.

CHARLES V. MOREN

OFFICE AND POST OFFICE ADDRESS:

Charles V. Moren Blackburn & Moren 815 N. E. Northgate Way Seattle, Washington 98125 Telephone: 365-5500





### MAY 2 3 975

BETTY J. MULLEN

SUPERIOR COURT CLURK

BY HEATHER HART
DEPUTY

M-2

IN	THE	SUPERIOR	COURT O	THE	STATE	٠F	WASHINGTON FOR KING	CCUNTY
	40.7							

Guadaishi 2	}
Maurten L'anson	No. GA19  CROER SETTING CASE
Defend nt	<b>3</b>
THIS MATTER having com	e on regularly to be heard in open of the (plaintiff) (defendent) for
an order setting the date of tri	al in the above-entitled cause,
and it appearing to the court th	et sold cause is at issue and ready
to be tried; now, therefore,	
	het the date of trial of the above-
/ N	Jakes 16 , 1075.
	5 73 dry of May, 1) 75.
	Can Lean.
ئىلىپ	DOE - COMMISSIONEA
Presented by:	Requested date is evailable:
Attorney for Plaintiff	Presiding Dept. Calendar Clark
Approved as to form:	Case is Jury or Nonjury
	Estimated length of trial 2 days
Attorney for Plaintiff Defendant	Date case was noted
	Nature of case appaintmely quade

(File with Clark in Presiding Judge's Department)

### IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON FOR KING COUNTY IN PROBATE

In the Matter of the	No. 6- 4419
Guardianship of	CHECK LIST FOR HEARING ON
MAUREEN I'ANSON	GUARDIAN'S PETITION FOR APPOINTMENT
Notice properly served	rcw 11.88.040
REMARKS, including action of court:	11 incompetent was Se
REMARKS, including action of court: (2) NoT in case a custod	dy of anyone (3) No G
	1 1 0
E SEA	MAYON HOPKINS
(A) has 18 can 2008 canages to a com-	COUNTY 3 1975
	BETTY DE RIOR O. HOPKINS
	<b>D</b> • · · · · · · · · · · · · · · · · · ·
_11	
Initials of checker:	Date of check: WAY 2
	1
Probate Form 42 (1969)	Υ (

### IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON IN AND FOR THE COUNTY OF KING

forpy rec l for flay

In the Matter of the Guardianship of

MAUREEN I'ANSON,

An Incompetent

No. G 4418 CD NOTICE OF EPOSITION UPON ORAL EXAMINATION

TO: Maureen 1 Anson	
and to:Charles V. Moren, of Blackburn, Moren &	Robinson, her attorneys
YOU, AND EACH OF YOU, WILL PLEASE TAI	KE NOTICE that the testimony of
Maureen I'Anson	will be taken upon
Oral Examination at the instance and request of the Thomas I'Ans	son, petitioner in the
above-entitled and numbered action, before a Notary Public, at 1600	Peoples Bank Bldg.
Seattle, Washington, onMonday the _15th_ day of	September 19 75,
commencing at the hour of _3:00_ o'clock _p.m. ; the said	Oral Examination to be subject to
continuance or adjournment from time to time or place to place unt	il completed, and to be taken on
the ground and for the reason the said witness will give evidence mater	ial to the establishment of the
petitioner's case.	
in mentermen 27 in 1 habe ber bet ber	

DATED this 2nd day of \_\_\_

Office, Post Office Address and Telephone of Attorneys Issuing Subpoena:

SCHWEPPE, DOOLITTLE, KAUG. TAUSEND, BEEZER & BEIERLE 1600 Peoples Nat'l Bank Bidg. 1415 Fifth Avenue SEATTLE, WASHINGTON 98171

Notary Public in and for the State of Washington

\_\_\_, 19<u>\_\_75</u>

September

DAVIS—IRWIN, CSR'S & ASSOCIATES Peoples National Bank Building Suite 1525 Seattle, Washington 98171 623-7881

THE STATE OF WASHINGTON, to: REV. DONALD BARNETT.

YOU ARE HEREBY COMMANDED to be and appear at the offices of Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle, Attorneys at Law, 1600 Peoples National Bank Building, Seattle, Washington, on Friday , the 19th day of September, 1975, commencing at the o'clock p.m., on said day, then and there to hour of testify as a witness at the request of Thomas I'Anson, petitioner in the above entitled cause, and to remain in attendance upon the undersigned until discharged. AND YOU ARE FURTHER COMMANDED to bring with you at said time and place the following books, papers, documents and tangible things, to wit: All balance sheets and other financial statements since the inception date of the Community Chapel and Bible Training Center, a Washington non-profit corporation; all correspondence from the Internal Revenue Service to the corporation; all federal tax returns since the inception date of the corporation; a list of all past and present members since date of inception of the corporation; a list of all past and present members of the Board of Trustees/Directors of the corporation since its inception date; the corporate minute book and any and all books, papers, records and documents explaining the organization and theology of the church.

HEREIN FAIL NOT AT YOUR PERIL

WITNESS my hand this 2nd day of September, 1975.

Notary Public in and for the State of Washington

Address and Telephone of Attorneys Issuing Subpoena:

Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle 1600 Peoples Bank Bldg. Seattle, Wash. 98171 223-1600

IN AND FOR THE COUNTY OF KING

In the Matter of the Guardianship

of

MAUREEN I'ANSON,

An Incompetent

No. G 4419

NOTICE OF DEPOSITION UPON ORAL EXAMINATION

TO: Maureen I'Anson				
and to: Charles V. Moren, of Blackburn, Moren & Robinson, her attorneys				
YOU, AND EACH OF YOU, WILL PLEASE TAKE NOTICE that the testimony of				
Rev. Donald Barnett will be taken upon				
Oral Examination at the instance and request of Thomas I'Anson, petitioner in the				
above-entitled and numbered action, before a Notary Public, at 1600 Peoples Natl. Bank Bldg,				
Seattle, Washington, on Friday the 19th day of September 19 75,				
commencing at the hour of 2:00 o'clock P.M.; the said Oral Examination to be subject to				
continuance or adjournment from time to time or place to place until completed, and to be taken on				
the ground and for the reason the said witness will give evidence material to the establishment of the				
petitioner's case.				
DATED this 2nd day of September 19 75				

Office, Post Office Address and Telephone of Attorneys Issuing Subpoena:

SCHWEPPE, DOOLITTLE, KRUG, The Length
BEEZER & BEIERLE
1600 Peoples Nat'l Bank Bidg.

1415 Fifth Avenue SEATTLE, WASHINGTON 98171 Notary Public in and for the State of Washington

DAVIS—IRWIN, CSR'S
& ASSOCIATES
Peoples National Bank Building
Suite 1525
Seattle, Washington 98171
623-7881

IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON FOR KING COUNTY

8 M 10:03

In the Matter of the Guardianship )

of

IN PROBATE NO. G 4419

MAUREEN I'ANSON, SUBPOENA DUCES TECUM

An Incompetent

THE STATE OF WASHINGTON, to: RAY SIEBOLD.

YOU ARE HEREBY COMMANDED to be and appear at the offices of Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle, Attorneys at Law, 1600 Peoples Bank Building, Seattle, Washington, on Tuesday, the 16th day of September, 1975, at the hour of 2:00 o'clock p.m. then and there to testify as a witness at the request of Thomas I'Anson, petitioner in the above entitled cause, and to remain in attendance upon the undersigned until discharged. AND YOU ARE FURTHER COMMANDED to bring with you at said time and place the following books, papers, documents and tangible things, to-wit: All balance sheets and other financial statements since the inception date of the Community Chapel and Bible Training Center, a Washington nonprofit corporation; all correspondence from the Internal Revenue Service to the corporation; all federal tax returns since the inception date of the corporation; a list of all past and present members of the corporation since its date of inception; a list of all past and present members of the Board of Trustees/Directors of the corporation since its date of inception; the corporate minute book and any and all books, papers, records and documents explaining the organization and theology of the church.

HEREIN FAIL NOT AT YOUR PERIL.

WITNESS my hand this 2nd day of September, 1975.

Notary Public in and for the State

of Washington.

Address and Telephone of Attorneys Issuing Subpoena:

Robert R. Beezer Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle 1600 Peoples Bank Building Seattle, Washington 98171 223-1600

In the Matter of the Guardianship

of

MAUREEN I'ANSON

An Incompetent

No. G. 4419

SEP 8 1975

MING Superior MULLEN COUNTY, Court Clerk

NOTICE OF DEPOSITION UPON ORAL EXAMINATION

TO: Maureen I'Anson					
and to: Charles V. Moren, of Blackburn, Moren & Robinson, her attorneys					
YOU, AND EACH OF YOU, WILL PLEASE TAKE NOTICE that the testimony of					
Ray Siebold will be taken upon					
Oral Examination at the instance and request of MXX Thomas I'Anson, petitioner in the					
above-entitled and numbered action, before a Notary Public, at 1600 Peoples Natl. Bank Bldg.					
Seattle, Washington, on <u>Tuesday</u> the <u>16th</u> day of <u>September</u> 1975,					
commencing at the hour of $2:00$ o'clock $p.m.$ ; the said Oral Examination to be subject to					
continuance or adjournment from time to time or place to place until completed, and to be taken on					
the ground and for the reason the said witness will give evidence material to the establishment of the					
petitioner's case.					
DATED this 2nd day of September 1975					

Office, Post Office Address and Telephone of Attorneys Issuing Subpoena:

Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle Robert R. Beezer 1600 Peoples Bank Bldg. Seattle, Wash. 98171 223-1600

Notary Public in and for the State of Washington

DAVIS-IRWIN, CSR'S
& ASSOCIATES
Peoples National Bank Building
Suite 1525
Seattle, Washington 98171
623-7881

## IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON IN AND FOR THE COUNTY OF KING

In the Matter of the Guardianship

of

MAUREEN I'ANSON,
An Incompetent

No. G 4419

**SUBPOENA** 

THE STATE OF WASHINGTON, to:
GREETINGS:
YOU ARE HEREBY COMMANDED to be and appear at the offices of
Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle: 1600 Peoples Bank
Building , Seattle, Washington, on Thursday , the 18th day of
September at the hour of 2:00 o'clock p.m., of said day, then and there
to testify as a witness at the request of thepetitioner, Thomas I'Anson
in the above-entitled cause, and to remain in attendance upon the undersigned or other Notary Public
until discharged; and
HEREIN FAIL NOT AT YOUR PERIL
WITNESS my hand and official seal this <u>2nd</u> day of <u>September</u> , 19 <u>75</u>

Office, Post Office Address and Telephone of Attorneys Issuing Subpoena:

Robert R. Beezer Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle 1600 Peoples Bank Bldg. Seattle, Wash. 98171 223-1600

Notary Public in and for the State of Washington

DAVIS—IRWIN, CSR'S & ASSOCIATES Peoples National Bank Building Suite 1525 Seattle, Washington 98171 623-7881



In the Matter of the Guardianship of

MAUREEN I'ANSON,

An Incompetent

No. G 4419

RENG RESTRY RULLER COUNTY Court Clerk

NOTICE OF DEPOSITION UPON ORAL EXAMINATION

TO:	Maureen I'Anson	·	
and to:	Charles V. Moren, of Blackburn, Moren & Re	obinson, her at	torneys
	YOU, AND EACH OF YOU, WILL PLEASE TAK	E NOTICE that the t	estimony of
: -	Jack DuBois	will be	taken upon
Oral Exam	mination at the instance and request of *** Thomas I'An:	son, petitione	in the
above-entit	itled and numbered action, before a Notary Public, al 600 Pe	eoples Bank Blo	ig,
Seattle, Wa	ashington, on <u>Thursday</u> the <u>18th</u> day of <u>Se</u>	eptember	19 <u>_75</u> _,
comm <b>enc</b> in	ing at the hour of $2:00$ o'clock $p.m.$ ; the said C	Oral Examination to b	e subject to
continuanc	ce or adjournment from time to time or place to place until	completed, and to	be taken on
the ground	d and for the reason the said witness will give evidence materia	al to the establishmen	it of the
pet	citioner's case.		
	DATED this 2nd day of Septer	mber 1975	

Office, Post Office Address and Telephone of Attorneys Issuing Subpoena:

Robert R. Beezer Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle 1600 Peoples Bank Bldg. Seattle, Washington 98171 223-1600

Notary Public in and for the State of Washington

DAVIS-IRWIN, CSR'S
& ASSOCIATES
Peoples National Bank Building
Suite 1525
Seattle, Washington 98171
623-7881

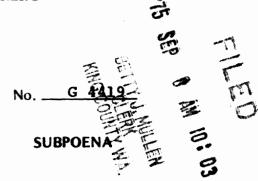
IN AND FOR THE COUNTY OF KING

In the Matter of the Guardianship

of

MAUREEN I'ANSON,

An Incompetent



THE STATE OF WASHINGTON, to:
GREETINGS:
YOU ARE HEREBY COMMANDED to be and appear at the offices of
Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle, 1600 Peoples
Bank Bldg., Seattle, Washington, on Monday, the 15th day of
September, 1975 at the hour of 2:00 o'clockp.m, of said day, then and there
to testify as a witness at the request of the <u>petitioner</u> , Thomas I'Anson
in the above-entitled cause, and to remain in attendance upon the undersigned or other Notary Public
until discharged; XXX
HEREIN FAIL NOT AT YOUR PERIL
WITNESS my hand and official seal this <u>2nd</u> day of <u>September</u> , 19 <u>75</u> .
we will a take to the take the

Office, Post Office Address and Telephone of Attorneys Issuing Subpoena:

SCHWEPPE, DOOLITTLE, NAME AND AND,
BEEZER & BELLAGE
1600 Peoples Nat'l Bank Bidg.
1415 Fifth Avenue
SEATTLE, WASHINGTON 98171

Notary Public in and for the State of Washington

DAVIS-IRWIN, CSR'S & ASSOCIATES Peoples National Bank Building Sulte 1525 Seattle, Washington 98171 623-7881

In the Matter of the Guardianship

of

MAUREEN I'ANSON,

An Incompetent

No. G 4419

NOTICE OF DEPOSITION UPON ORAL EXAMINATION

TO: Maureen I'Anson,
and to: Charles V. Moren, of Blackburn, Moren & Robinson, her attorneys
YOU, AND EACH OF YOU, WILL PLEASE TAKE NOTICE that the testimony of
DENNIS PANGBURN will be taken upon
Oral Examination at the instance and request of ** Thomas I'Anson, petitioner in the
above-entitled and numbered action, before a Notary Public, at 1600 Peoples Bank Bldg.
Seattle, Washington, on Monday the 15th day of September 19 75,
commencing at the hour of 2:00 o'clock p.m.; the said Oral Examination to be subject to
continuance or adjournment from time to time or place to place until completed, and to be taken on
the ground and for the reason the said witness will give evidence material to the establishment of the
petitioner'scase.
DATED this 2nd day of September, 19 75

Office, Post Office Address and Telephone of Attorneys Issuing Subpoena:

SCHWEPPE, DOOLITTLE, KRUB, YOUGHD,
BEEZER & BEIERLE
1600 Peoples Nat'l Bank Bidg.
1415 Fifth Avenue
SEATTLE, WASHINGTON 98171

Notary Public in and for the State of Washington

DAVIS-IRWIN, CSR'S
& ASSOCIATES
Peoples National Bank Building
Suite 1525
Seattle, Washington 98171
623-7881

KING

**Plaintiff** 

Defendant

Garnishee Defendant

t. for

\_\_\_\_\_Co. y, State of Wash. No. G 4419

**EXAMINATION** 

of Washington, residing at Seattle

Total \$ 5.00

Cert.

Mail

1.00

AFFIDAVIT OF SERVICE OF

SUBPOENA FOR DEPOSITION: NOTICE

OF DEPOSITION UPON ORAL

9/15/75 @ 2:00 m.m.

In the <u>SUPERIOR</u>

State of Washington

AFFIDAVIT OF SERVICE

IN THE MATTER OF THE GUARDIANSHIP OF

MAUREEN I'ANSON, An Incompetent

VS.

the SUPERIOR C t, for KING	Co y, State of Wash. No. <u>G 4419</u>
IN THE MATTER OF THE GUARDIANSHIP OF	AFFIDAVIT OF SERVICE OF
MAUREEN I'ANSON, An Incompetent vs. Plain	ntiff  NOTICE OF DEPOSITION UPON ORA  EXAMINATION: SUBPOENA FOR  DEPOSITION  9/18/75 @ 2:00 p.m.
Defend	
Garnishee Defend State of Washington  County of King  The undersigned, being first duly sworn, on oath deponentioned was a citizen of the United States and resident of	oses and says: That he is now and at all times her
years, not a party to or interested in the above entitled action.  That on 9/4/75 at 9:00A M., at 18635  King County, Washington, affiant duly served the above-description.	5 - 8th South, Seattle
Jack Dubois	
That at the time and place set forth above affiant duly entitled matter upon  by then and there, at the residence and usual place of abode	
correct copy thereof into the hands of and leaving the same w	
being a person of suitable age and discretion then resident the  Affiant further states that he is informed and believes, a is in the military service of the United States.	
Subscribed and Sworn to before me 9/4/75	S. Koch
Service Fees 4.00 Travel 3.50 Nontary Fee 1.	NOTARY PUBLIC in and for the State of Washington, residing at Seattle Cert. Total \$_8.80

In the SUPERIOR Cut, for KING Couy, State of Wash. No. G 4419

RESIDENCE SERVICE

Fee

KING

# FILED

'75 SEP 17 AM 10 80 1 BETTY J. MULLEN 2 CLERK KING COUNTY WA 3 IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON FOR KING COUNTY 4 In the Matter of the Guardianship 5 of MAUREEN I'ANSON, G - 4419 L NO. 6 An Incompetent, and 8 GERTRUDE JANE STEWART, 9 Plaintiff, 799146 NO. 10 vs. STIPULATION AND ORDER 11 THOMAS I'ANSON, OF CONSOLIDATION 12 Defendant. 13 COME NOW the parties to the above captioned proceedings by 14 their respective attorneys, and stipulate and agree that the trial of 15 the merits of Cause No. G-4419 and Cause No. 799146 shall be consoli-16 dated for trial on the date of October 16, 1975, which has already 17 been established by the Court. 18 DATED this 2rd day of September, 1975. 19 20 Charles Of Blackburn

Attorneys for Manneen I'Anson

Of Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle Attorneys for Thomas I'Anson

ohn P. Mucklestone Of Mucklestone & Mucklestone Attorneys for Gertrude Jane Stewart

Stipulation and Order of Consolidation -1

21

22

23

24

25

26

27

28

29

30

31

32

### ORDER OF CONSOLIDATION FOR TRIAL

THIS MATTER having come on regularly before the undersigned Judge of the above entitled Court upon the foregoing stipulation of counsel and the Court being fully advised in the premises, NOW, THEREFORE,

IT IS ORDERED that Cause No. G-4419 and Cause No. 799146 are and shall be consolidated for the purposes of trial on October 16, 1975, which date has already been established by the Court.

DONE IN OPEN COURT this day of September, 1975.

Jude Court Complissioner

Presented by:

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18 19

20

21

22

23

24

25

26

27

28

29

30

31

32

MUCKLESTONE & MUCKLESTONE

John P. Mucklestone Attorneys for Gertrude Jane Stewart

Notice of Presentation Waived:

**BLACKBURN & MOREN** 

Charles V. Moren Attorneys for Maureen I'Anson

SCHWEPPE, DOOLITTYE KRUG, TAUSEND, BEEZER & BEIERLE

Robert H. Beezer Attorneys for Thomas I'Anson

Stipulation and Order of Consolidation -2

KING

for

6 4419

State of Wash. No.

RESIDENCE SERVICE

AFFIDAVIT OF SERVICE

In the SUPERIOR

1	·
2	•
3	
4	IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON FOR KING COUNTY
5 6	In the Matter of the Guardianship )  NO. G 4419  of
7	MAUREEN I'ANSON, ) SUBPOENA )
8	An Incompetent )
9	,
10	THE STATE OF WASHINGTON, TO: RAY SIEBOLD
11	GREETINGS: You are hereby commanded to appear in the
12	courtroom of the Presiding Judge, of the Superior Court of the
13	State of Washington, Room No. E942, King County Courthouse,
14	Third and James, Seattle, Washington 98104, at 9:30 o'clock
15 16	A.M., on the 16th day of October, 1975, then and there to give
17	evidence in a certain cause wherein Thomas I'Anson is the
18	petitioner in the above referenced guardianship; and to remain
19	in attendance on said Court until discharged.
20	HEREIN FAIL NOT AT YOUR PERIL.
21	Dated at Seattle, Washington, this 8th day of October,
55	1975.
23	SCHWEPPE, DOOLITTLE, MUG, TAUSEND, BEEZER & BEIERLE
24	BY
25	Robert R. Boezer Attorneys for Petitioner
26	
27	
28	
29	
30	Cubroons
52	Subpoena SCHWEPPE, DOOLITTLE, KRUG, TAUSEND BEEZER & BEIERLE

1600 PEOPLES NATIONAL BANK BUILDING 1415 FIFTH AVENUE SEATTLE, WASHINGTON 98171 223-1600

31

, for KING

In the <u>SUPERIOR</u>

MAUREEN I'ANSON.

An Incompetent.

State of Washington

County of King

0F

IN THE MATTER OF THE GUARDIANSHIP

. State of Wash. No. <u>G 4419</u>

AFFIDAVIT OF SERVICE OF

**SUBPOENA** 

\_Co

TRIAL, 10/16/75, 9:30am

The undersigned, being first duly sworn, on oath deposes and says: That he is now and at all times herein mentioned was a citizen of the United States and resident of the State of Washington, over the age of eighteen years, not a party to or interested in the above entitled action and competent to be a witness therein.

Garnishee Defendant

10/10/75 at 9:00A M. at 18635 - 8th S., Seattle King County, Washington, affiant duly served the above-described documents in the above-entitled matter upon

**Plaintiff** 

Defendant

by then and there personally delivering a true and correct copy thereof into the hands of and leaving same with

by then and there, at the residence and usual place of abode of said person , personally delivering a true and correct copy thereof into the hands of and leaving the same with\_\_\_\_\_

Affiant further states that he is informed and believes, and therefore alleges, that neither of said defendants

Subscribed and Sworn to before me 10/12/75

3

NOTARY PUBLIC in and for the State of Washington, residing at Seattle

Cert. Total \$ 4.00 1.00 Fee

AFFIDAVIT OF SERVICE

Service Fees

•	
2	
3	
4	IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON FOR KING COUNTY
5 6	In the Matter of the Guardianship )  NO. G 4419
7	MAUREEN I'ANSON, SUBPOENA
8	An Incompetent )
9	)
10	THE STATE OF WASHINGTON, TO: JACK DUBOIS
11	GREETINGS: You are hereby commanded to appear in the
12	
13	courtroom of the Presiding Judge, of the Superior Court of the
34	State of Washington, Room No. E942, King County Courthouse,
15	Third and James, Seattle, Washington 98104, at 9:30 o'clock
16	A.M., on the 16th day of October, 1975, then and there to give
17	evidence in a certain cause wherein Thomas I'Anson is the
18	petitioner in the above referenced guardianship; and to remain
19	in attendance on said Court until discharged.
20	HEREIN FAIL NOT AT YOUR PERIL.
21	Dated at Seattle, Washington, this 8th day of October,
22	1975.
23	SCHWEPPE, DOOLITTLE, KRUG, TAUSEND, BEEZER'S BEIERLE
24	BY MAN
25	Robert R Beezer Attorneys for Petitioner
26	
27	
28	V.
29	
30	
31	Subpoena SCHWEPPE, DOOLITTLE, KRUG, TAUSEND BEEZER & BEIERLE 1600 PEOPLES NATIONAL BANK BUILDING

SCHWEPPE, DOOLITTLE, KRUG, TAUSEND BEEZER & BEIERLE 1800 PEOPLES NATIONAL BANK BUILDING 1415 FIFTH AVENUE SEATTLE, WASHINGTON 98171 223-1800

**AFFIDAVIT OF SERVICE** 

1	
2	
3	
4	IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON FOR KING COUNTY
5 6 7	In the Matter of the Guardianship )  of  NO. G 4419  SUBPOENA  MAUREEN I'ANSON,
8 9	An Incompetent )
10	
11	THE STATE OF WASHINGTON, TO: DENNIS PANGBURN
12	GREETINGS: You are hereby commanded to appear in the
13	courtroom of the Presiding Judge, of the Superior Court of the
14	State of Washington, Room No. E942, King County Courthouse,
	Third and James, Seattle, Washington 98104, at 9:30 o'clock
15	A.M., on the 16th day of October, 1975, then and there to give
18	evidence in a certain cause wherein Thomas I'Anson is the
17	petitioner in the above referenced guardianship; and to remain
18	in attendance on said Court until discharged.
19	HEREIN FAIL NOT AT YOUR PERIL.
20	Dated at Seattle, Washington, this 8th day of October,
21	1975.
<b>2</b> 2	SCHWEPPE, DOOLITTLE KRUG, TAUSEND, BEEZER & EXTERLE
24	BY Robert R. Seezer
25	Robert R. Seezer Attorneys for Petitioner
26	
27	
28	,
29	
30	

Subpoena

31

KING COUNTY, WASHINGTON OCT 1 0 1975 BETTY J. TULLEN

BY LORETTA M. PYNE

2

1

3

4 5

в

7

8

9

10

11

12

13 14

15 18

17

18

19 20

21 22

23

24 25

28

27

28

29

30 33

FOR KING COUNTY In the Matter of the Guardianship )

IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON

of MAUREEN I'ANSON,

An Incompetent

OF AUTHORITY IN SUPPORT OF PETITION FOR LETTERS

Maureen I'Anson Pangburn, during her minority, was involved in an automobile collision as a result of which she is now a quadraplegic. After several years of litigation including an appeal to the Supreme Court of Alaska, insurance settlements generated in excess of \$650,000 in damages. These funds are now available for distribution to Maureen. All attorneys fees and costs of suit have been paid.

The compensation which Maureen I'Anson will receive is a recognition by the insurance carrier of the fact that jury verdicts of great magnitude reflect the basic compassion of society when confronted with a severely injured person. However, an unfortunate aspect of large lump sum payments to successful plaintiffs is that, in many instances, if not most, the plaintiff is unsophisticated and tends to fall prey to unwise investments. Accordingly, many such plaintiffs who have been compensated with a view toward assuring their financial security throughout the balance of a life of physical disability are impoverished within a year or two, and, hence, the course of justice is frustrated. Neither the laws of Washington and Alaska nor the law of any other jurisdiction make periodic payment of such compensation mandatory. Conservator-ships are designed to protect the improvident in some jurisdictions.

In the instant case, Maureen I'Anson has repeatedly expressed the intention to divest herself of a substantial portion of her damage award and to give such proceeds to the Community Chapel and Bible Training Center which was incorporated in the State of Washington on or about November 2, 1967. Such a gift will completely defeat the interests of society and of Maureen I'Anson. Such a gift will completely defeat the purposes for which the law has made compensation available. Such a gift will constitute a breach of fiduciary duty which Maureen I'Anson owes to society. If impoverished after the making of such a gift, the donor may well become a charge to public welfare or dependent upon the good will of her family for necessary support and care.

We suggest that this court fashion a remedy which recognizes the basic interests of Maureen, her church, her family and society. We suggest periodic disbursement of such funds subject to the continuing equitable jurisdiction of this court. To accomplish this it is necessary to have a guardian of her estate, and such an appointment is proper.

### I. GUARDIANSHIP

7/3

The authority for appointment of guardians is codified at RCW 11.88.010 which says:

The superior court of each county shall have power to appoint guardians for the persons and estates, or either thereof, of incompetent persons resident of the county, and guardians for the estates of all such persons who are nonresidents of the state but

Pet. Memo. of Authority in Support of Petition for Letters - page 2.

who have property in such county needing care and attention.

- An "incompetent" is any person who is either
- (1) Under the age of majority, as defined in RCW 11.92.010, or
- (2) Incapable by reason of insanity, mental illness, imbecility, idiocy, senility, habitual drunkenness, excessive use of drugs, or other mental incapacity, of either managing his property or caring for himself or both.

Opinions of the Washington Supreme Court have consistently interpreted RCW 11.88.010 to permit the appointment of a guardian for the estate of a person who is incapable of managing his property by reason of mental unsoundness. It is not necessary to find mental illness to a degree requiring committment.

In re Ervay, 64 Wash. 138, 116 Pac. 591 (1911) is concerned with a person who was severely influenced by spiritual advisers. Approving the appointment of a guardian, the court says (p.140):

Mron Erway seems unable to resist the blandishments of those who approach her professing an interest in her spiritual welfare. She first becamse a victim of a so-called spiritual medium, who soon possessed himself of all her ready cash and a power of attorney from her authorizing him to transact her general business. by the interference of her family that the influence of the person over her was counteracted and the management of her property returned to her Later she met with a discredited bapown hands. tist preacher who succeeded in obtaining from her large sums of money, ostensibly for church work, but which seem to have been largely retained by the preacher for his own private use. These, with other matters appearing in the record, make it clear to our minds that unless the management of her affairs is conducted through the courts her considerable fortune will be taken from her and she will become either a charge on the bounty of her relatives or a ward of the state. The orders appealed from should be affirmed, and it is so directed. (Emphasis added).

In re Bayer's Estate, 101 Wash. 694, 172 Pac. 842 (1918), lays down the classic test employed to determine the need for a guardian and at page 695, the court says:

Pet. Memo. of Authority in Support of Petition for Letters - page 3.

28

3

9

2

4 5

\_

в

7

8

9

10

11

12

13

14

15

16 17

18

19

20

21

22

24

25

26

27

29

The rule which is generally supported by the authorities is stated in 22 Cyc., page 1139, as follows:

"Generally speaking the test of whether a quardian should be appointed for the estate of a person is whether mental unsoundness exists to such a degree that he is incapable of conducting the ordinary affairs of life, so that to leave his property in his possession and control would render him liable to become the victim of his own folly or of the fraud of It is not necessary in most states that the person should be an idiot or a lunatic in the strict sense of those terms. . . "

After discussing conduct showing the susceptibility of Mrs. Bayer to irrational business transactions, the court continues (p. 698):

It is not claimed, either by her or by her brother, who was the beneficiary of the transaction, that it was intended to be anything else than a pure business transaction. An improvident business transaction may be competent evidence in support of an application for a guardianship, and should be taken into consideration, in connection with all the other evidence in the case, in determining the question of mental incompetency. Shelby v. Farve, 33 Okl. 651, 126 Pac. 764; <u>In re Chappel's</u> <u>Estate</u>, 189 Mich. 526, 155 N. W. 569.

In the case last cited it was said:

"An improvident business transaction may be competent evidence in support of an application for guardianship; most of the acts of a respondent in such a case are competent as going to show the mental condition. But such an improvident act becomes cogent proof of mental incompetency only as it is reinforced and explained by other facts and circumstances".

The court, in In re Pfeiffer, 10 Wn.2d 703, 118 P.2d 158 (1941), makes the distinction between insanity and the disability sufficient to support the appointment of a quardian. Even though Mr. Pfeiffer was found sufficiently competent to be discharged from the state mental hospital, the court finds the continuation of guardianship proper. At page 716 the court says:

Pet. Memo. of Authority in Support of Petition for Letters - page 4.

7

2

3

4

5 в

7

10

11

12

13

14

15

16

17

18

1.9

20

21

22

23 24

25

26

27

28

29

30 34

We have recognized in this state the difference between "insanity" and mental competency to handle one's business affairs. In the case of <u>In reBayer's Estate</u>, 101 Wash. 694, 172 Pac. 842, we reversed an order of the lower court refusing to appoint a guardian for an incompetent person, therein stating:

"The question to be determined upon this appeal is not whether Mrs. Bayer was insane, but whether she was incapable of managing her business affairs by reason of mental unsoundness."

The same guardianship matter was again before us in 111 Wash. 276, 190 Pac. 323, and we again reversed an order of the lower court holding that the guardian should be discharged. We there stated:

"We do not think it profitable to discuss the evidence at length. It was directed mainly to the question of the sanity of Mrs. Bayer. While it establishes, in our opinion, the fact that she is not insane in the sense that she requires confinement, or requires the supervision of a guardian over her person, we think it falls far short of establishing that she is competent to manage her property interests, or as the statute has it, 'capable of managing her own affairs.'"

We are therefore of the opinion that the order of May 10, 1941, entered in the insanity proceedings (No. 28484), should be vacated, and an order entered to the effect that George Pfeiffer has been restored to sanity, without reference to any adjudication as to his mental competency to handle his business affairs, and without reference to the guardian or to the guardianship proceedings.

Generally, the question of disability is discussed in Anno. - Incompetent - Guardianship 17 ALR 1065 (1922) and Anno. - Incompetent - Guardian - Mental State 9 ALR 3rd 774 (1966).

## II. THE FIDUCIARY RELATIONSHIP

There is no uniform practice among the courts in the use of the terms "fiduciary relation" and "confidential relation".

In many decisions, the words are used as synonymous. In most cases however, the terms are used in connection with recognized

Pet. Memo. of Authority in Support of Petition for Letters - page 5.

28

B

2.5

relationships that exist in trusts, estates, partnerships, corporations, attorneys and agency. These branches of the law have distinctive names but the term fiduciary is not necessarily restricted in its application to the relationships arising in those fields.

Here we propose that the court consider the application of fiduciary principles to the conduct of Maureen I'Anson with respect to settlement proceeds derived from the State of Alaska for her care and also to the conduct of The Community Chapel and Bible Training Center with respect to the acceptance of a gift of a substantial portion of such proceeds.

In <u>Salhinger v. Salhinger</u>, 56 Wash. 134, 105 Pac. 236 (1909) the court is dealing with the dissolution and settlement of a partnership. We cite the case for the equitable principles there laid down and applied to those in the fiduciary relationship. At page 138, the court says:

It was, therefore, the duty of Henry Salhinger, in effecting a settlement with his brother, to disclose to him fully the condition of the partnership affairs, so that in determining the nature and terms of his settlement Samuel might be as fully apprised of the real facts and true condition as Henry himself. This, according to the petition, he did not do; rather is it charged he sought to conceal the true situation; and knowing his brother's physical and mental weakness, he kept him away from his friends and advisers, misrepresenting the true condition of the partnership business, asserting as a failure and profitless concern that which it is said in truth was prosperous and of the value of \$60,000. The advantage thus gained the law will not permit to be retained; for, as is said in Roby v. Colehour, 135 Ill. 300, 337, 25 N. E. 777, quoting Mr. Pomeroy:

"Whenever two persons stand in such a relation that, while it continues, confidence is necessarily reposed by one, and the influence which naturally grows out of that confidence is abused, or the influence is exerted to obtain an advantage at the expense of the confiding party, the person availing himself of his position will not be permitted to retain the advantage, although the transaction could

Pet. Memo. of Authority in Support of Petition for Letters - page 6.

2.

4

5

6

7

10

11

12

13

14

15

18

17

18

19

20

21

22

23

24

25

26

27

3+1

not be impeached if no confidential relation had existed."

2

3

1

Mr. Pomeroy, in speaking of this rule, says:

4 5

"It is settled by an overwhelming weight of authority that the principle extends to every possible case in which a fiduciary relation exists as a fact, in which there is confidence reposed on one side, and the resulting superiority and influence on the other." 2 Pomeroy, Equity Jurisp. (3d. ed), §956.

7

8

9

B

In using the above language, Mr. Pomeroy is speaking of equitable interference, but the reason of the law and the law itself is the same, as applied to actions of this character, ehether the right sought to be enforced springs from statutory or equitable authority.

10

11

IV Scott, Trusts 3129 §468 (1956) says:

12

There are numerous cases in which it has been held that where the title to land or chattels or money is obtained by undue influence exerted by the transferee upon the transferor, a constructive trust arises. Thus where a person who is in a fiduciary or confidential relation to another obtains property from the other by taking advantage of the relation, a constructive trust arises.

15 16

14

In Bangasser & Assoc. v. Hedges, 58 Wn.2d 514, 364 P.2d

17

237 (1961), the court says (p. 516):

20

21

22

[1] The constructive trust is equity's antidote for the pain wrought by freedom of contract between persons of unequal ability. Cardozo described it as "the formula through which the conscience of equity finds expression" (Beatty v. Guggenheim Exploration Co., 225 N.Y. 380, 386, 122 N. E. 378), and as "the remedial device through which preference of self is made subordinate to loyalty to others." Meinhard v. Salmon, 249 N.Y. 458, 164 N. E. 545, 62 A.L.R. 1.

24

25

23

The rule stated in 2 Pomeroy's Equity Jurisprudence, §1053, was adopted in Rozell v. Vansyckle, 11 Wash. 79, 83. 39 Pac. 270:

26

"In general, whenever the legal title to property, real or personal, has been obtained through actual fraud, misrepresentations, concealments, or through undue influence, duress, taking advantage of one's

29

28

Pet. Memo. of Authority in Support of Petition for Letters - page 7.

130 1301 1111

2

3

5

8

7

8

9

10

11

12

1.3

14

15 18

17

18

19

20

21

22

23

24

25

26

27

28

October 15, 1975

Pet. Memo. of Authority in Support of Petition for Letters - page 8.

weakness or necessities, or through any other similar means or under any other similar circumstances which render it unconscientious for the holder of the legal title to retain and enjoy the beneficial interest, equity impresses a constructive trust on the property thus acquired in favor of the one who is truly and equitably entitled to the same;. . . and a court of equity has jurisdiction to reach the property either in the hands of the original wrong-doer, or in the hands of any subsequent holder, until a purchaser of it in good faith and without notice acquires a higher right, and takes the property relieved from the trust.'"

Accord: <u>Kausky v. Kosten</u>, 27 Wn.(2d) 721, 179 P.(2d) 950; <u>Nicolai v. Desilets</u>, 185 Wash. 435, 55 P. (2d) 604; Seventh Elect Church in Israel v. First Seattle Dexter Horton National Bank, 162 Wash. 437, 299 Pac. 359; Pacheco v. Mello, 139 Wash. 566, 247 Pac 927.

[2] There was a constructive trust.

## III. CONCLUSION

We recognize that the issues confronting the court and the parties do not arise in the common framework of facts surrounding an application for appointment of guardian. disbursement of a large sum of money paid for the express purpose of caring and treating a quadraplegic for life carries a concomitant obligation to see to it that the funds are devoted to the purposes intended. The law is not so adolescent in its development that it lacks the mechanisms to accomplish the results sought by the petitioner. The court should carefully consider the alternatives of quardianship or constructive trust against potential mischief of undue influence in the disposition of one's estate by gift.

Respectfully submitted

SCHWEPPE, DOOL TITLE TAUSEND DEELER

Robert R Beezer

OCT 16 1975 BETTY J. MULLEN BY LORETTA M. PYNE

2

1

3

4 5

6

7

8 9

10

11 12

13

14 15

16

17

19

20

21

22 23

24

25 26

27

28 29

30

31

32

No. G-4419

MEMORANDUM BRIEF SUBMITTED BY

MAUREEN I'ANSON. MAUREEN I'ANSON an Incompetent.

IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON FOR KING COUNTY

In the Matter of the Guardianship )

of

THE ABOVE proceeding involves a Petition by Thomas I'Anson to have a Guardian appointed of the Estate of Maureen I'Anson, his daughter, on the ground that she "is an incompetent person who is incapable of managing her property by reason of mental illness or by reason of other mental incapacity," referring to paragraph 3. on page 1 of the "Petition for Guardian of Estate." It is further pointed out in the Petition that Maureen received a total of \$1,070,000.00 as a settlement in a personal injury action brought against the State of Alaska in which she was represented by attorney Russell Newman and, inasmuch as Maureen at the time the civil action in Alaska was commenced, Maureen's father, Thomas I'Anson, the petitioner herein, was also a party inasmuch as he was seeking to recover hospital and medical expenses incurred in treating Maureen as a result of the auto accident in question. Out of the net amount, remaining after payment of attorneys fees and some of the expenses incurred, a total of \$696,195.54 was placed in the Pacific National Bank of Washington in the form of a monthly certificate of deposit, with no funds to be withdrawn, pursuant to the agreement between Maureen I'Anson and her father, through their respective attorneys, without the written approval

31

32

of both parties. At present there remains in this account a total of \$602,660.78, and petitioner, Thomas I'Anson claims that he is entitled to a portion of these funds for various expenses incurred by him in connection with the litigation in Alaska. The parties have not been able to amicably resolve the amount due Thomas I'Anson out of these settlement proceeds, so that is one of the issues involved in this current proceeding.

The principal issue in the current proceeding is the determination of the question of whether or not Maureen is "incompetent" within the meaning of the Washington statutes granting the Court authority to appoint a quardian for the person of an estate, being RCW 11.88.010. In support of his petition with regard to this issue, Mr. I'Anson alleges that "Maureen I'Anson has consulted with spiritual advisors and others and believes that her medical condition will improve to the point where she will no longer be totally and permanently disabled. In accordance with these views and the religious convictions of Maureen I'Anson, she believes that the settlement proceeds, or at least \$540,000.00 of such proceeds, should be contributed to Community Chapel and Bible Training Center, a Washington non-profit corporation, located at 13635 - 8th Avenue South, Seattle, Washington," all as set forth in paragraph 11 of petitioner's petition. Relative to such allegations, we point out to the Court that when Mr. Beezer, as counsel for Thomas I'Anson, took the deposition of Maureen I'Anson, Maureen testified that she has not made any decision as to what she proposes to do with any of the settlement funds available to her and that she is seeking counsel in this regard, and although she will give considerable weight to any religious or spiritual counsel of the President of Community Chapel and Bible Training

5

Center, if she solicits any such counsel, she will use her own judgment in any decision and be obedient to God's will in this matter to such extent as she understands His will. We are further confident that the testimony will be undisputed that Maureen, in any event, will retain at least \$150,000.00 out of the settlement proceeds, as a minimum, for her own personal needs, over and above such expenditures that have already been made.

The statutory authority, pursuant to which the petitioner appears is set forth in <a href="RCW 11.88.010">RCW 11.88.010</a>. This statute provides that the Court has authority to appoint guardians for the persons and estates or either thereof, of incompetent persons, and the statute defines an "incompetent" person as follows:

"Incapable by reason of insanity, mental illness, imbecility, idiocy, senility, habitual drunkenness, excessive use of drugs, or other mental incapacity, of either managing his property or caring for himself or both."

The testimony which will be presented on behalf of Maureen I'Anson will reveal unmistakably clearly, we believe, that Maureen is not "incompetent" within the foregoing definition. On the contrary, it is submitted that the testimony which will be presented will disclose that indeed Maureen is unimpaired with regard to her mental processes and that she is giving intelligent and entirely rational consideration as to her proposed disposition of the funds in question. The fact that Maureen's father may have a completely different outlook on life, or a completely different philosophy, or a completely different spiritual status than Maureen should in no way be determinative of the competency or incompetency of his own daughter. The testimony will disclose that Maureen is a Christian, who accepts the Bible as the inspired word of God, and she has committed her life to the spiritual

principles set forth in the "Holy Scriptures." To this end, therefore, and to such extent as Maureen chooses to make any charitable contribution to a church or bible training center which likewise teaches and practices the same Christian principles based on the same scriptures the Court should be hard pressed indeed to determine ipso facto that Maureen is incompetent, within the definition of the Washington statutes. Were the Court to take such an approach, it is respectfully submitted that the Court would have to conclude that many of those who, through the ages, have made the greatest spiritual impact on the nations, have been mentally "incompetent."

## LAW

The attention of the Court is invited to the following Washington cases:

1. In re Michelson (1941) 8 Wn 2d 327, 111 P.2d 1011.

In this case five of the ten children of a 79 year old widow, Mrs. Michelson, petitioned the Court to appoint a guardian for the estate of their mother. About one year later, five of the children filed objections to a petition by Mrs. Michelson to revoke the former order appointing the guardians for her estate. This case involves an appeal from the order of the trial court in refusing to revoke its former order appointing guardians for the estate of Mrs. Michelson whom the court had found to be an incompetent person. The Supreme Court pointed out that under the then existing statutes, being Remington Revised Statutes \$1565, no definition was set forth for an insane or incompetent person. The Court stated,

"Under a statute of that character, the unsoundness of mind which would justify the appointment of a guardian must be more than a mere debility or impairment of memory. It must be such as to deprive

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17 18

19

20

21

22 23

24

25

26 27

28

29 30

31

32

the person affected of ability to manage his estate. If the person for whom a guardian is sought is capable of transacting the ordinary business involved in taking care of his property, and if he understands the nature of his business and the effect of what he does, and can exercise his will with reference to such business, notwithstanding the influence of others, he is not of unsound mind, and a guardian should not be appointed for his property." (page 335).

The Supreme Court, in overruling the trial court and in thereby determining that Mrs. Michelson was not incompetent, further stated,

"In the case now before us, the evidence shows, and the trial court expressed the view, that Mrs. Michelson had sufficient will power to manage her own affairs when dealing with strangers or others than her own children. So far as we are informed, there are no authorities holding that, when one group of children are of the view that a parent will not deal fairly with them in his disposition of his property, in the absence of overreaching or fraud, that furnishes any basis for the appointment of a guardian; and there is no evidence in this case which would justify a finding of overreaching or fraud. Apprehension in that regard is not to be indulged in." (page 336)

2. In re Nelson (1942) 12 Wn 2d 382, 121 P.2d 968. In this case the Supreme Court reversed an order of the trial court which denied the termination of a guardianship of Mrs. Ethel Nelson a widow. The opinion is lengthy and recites the evidence in considerable detail. The evidence does establish beyond controversy that Mrs. Nelson had been suffering from diabetes for over 15 years and needed to take insulin to control the disease. There was conflicting testimony by medical specialists concerning her ability or inability to manage her own business affairs. In reversing the trial court, however, and in thereby holding that Mrs. Nelson's petition for discharge of the guardian of her estate should be granted, the Supreme Court stated as follows:

32

"We are convinced that the evidence preponderates against the conclusion of the trial court, that appellant is mentally incompetent to manage her own business affairs. It appears beyond question that appellant's mind still functions to a great extent normally. She is perfectly capable of knowing what she enjoys to do and what she wants, and of deciding what she desires to do and what she desires not to do. It is, of course, significant that, sick and suffering as she is, neither respondent nor anyone else has suggested that any necessity exists for the appointment of a guardian for appellant's person. Of course, she is physically weak, she is nervous, and, when tired and thereby rendered more nervous than usual, her mind does not react as keenly or quickly as normally it does, or as it did years ago. There is nothing surprising in this condition, and all things considered, it would seem that appellant is in better condition mentally than would ordinarily be expected." (page 397)

3. In re Heuschele (1949) 34 Wn. 2d 414, 208 P. 2d 1167. We believe it is sufficient, for the purpose of analyzing the reasoning and holding of the Supreme Court to simply quote the entire headnote as follows:

"In proceedings for the appointment of a guardian for the estate of a person eighty-seven years old, held that the evidence sustains the finding of the trial court that the person is unable to carry on her ordinary business affairs and that her son, who in the past has handled her business affairs and in whom she has confidence, is a proper person to be appointed guardian of her estate and should be so appointed."

We interject, however, that the trial court repeatedly stated, as set forth on pages 420 and 421 of the opinion, that the trial court found that Mrs. Heuschele was not competent to exercise her own independent judgment free from the influence of others and that this was the basis for the trial court's conclusion that a guardian should be appointed and, as stated above, the Supreme Court upheld this conclusion of the trial judge.

18 19

20

21

22 23

24

25 26

27

28 29

30

31

32

Memorandum Brief Submitted By Maureen I'Anson

ALR 3rd 774 Annotation on "mental condition which will justify the appointment of quardian, committee or conservator of the estate for an incompetent or spendthrift." This is a rather extensive annotation covering some 72 pages illustrative of various types of conditions which were held to warrant or not to warrant the appointing of a guardian of a person's estate. Particularly relevant to the matter at issue are paragraphs 4 and 6, dealing with eccentricity and improvident disposition of funds. The Court's attention is invited to the Maryland case referred to on page 794, wherein it was held that the evidence did not show that an aged woman was incompetent so as to require the appointment of a committee for her estate where it was charged

> "she was afflicted with a mania on the subject of Christian missions, and the form of her insanity was described as religious paranoia."

Of similar import is the case of In Re Smith (1927) 26 Ohio NP NS 533, referred to on page 794 wherein it was held

> "that one should not be declared mentally incompetent to handle his business and personal affairs merely because he holds religious beliefs different from those of the majority of the people."

## CONCLUSION

It is submitted in conclusion that the evidence will demonstrate clearly and convincingly that Maureen I'Anson is entirely mentally rational and that she is entirely competent to manage her estate utilizing appropriate reasoning and rational judgment, which in no way is inconsistent with her religious convictions and beliefs.

Respectfully submitted,

Attorney for Maureen I'Anson

BLACKBURN, MOREN & ROBINSON ATTORNEYS AT LAW 818 N.E. NORTHGATE WAY, BUITE 204 SEATTLE, WASHINGTON 98128 TRLEPHONE 365-8500

IN THE SUPERIOR COURT OF THE STATE OF ASHINGTON FOR KING COUNTY  IN PROPERTE
In the Matter of the  Guardianship of  BETTY OF TO CHECK LIST FOR HEARING ON GUARDIAN'S PETITION FOR APPOINTMENT
Notice properly served
in competent (appears) no severn doctor's statement 3 30 days have passed since petition filed.  The no-one has conc + custody one other galn.
6 no gdn ad litem appit
・ 二年 また (本) Mark and and C なだいが、 p Mark to device と production as
Initials of checker: KOK Date of check: 15 Oct 75
Probate Form 42 (1969)

15 007 21 PN 1:42

1

2

3

4 5

6 7

8

9

10 11

12

13 14

15

16 17

18

19 20

21

22

23 24

25

26

27

28 29

30

31

Judgment - P. 1

IN PROBATE

JUDGMENT

G 4419

An Incompetent

In the Matter of the Guardianship )

of

MAUREEN I'ANSON,

This matter came on duly and regularly for trial before the undersigned Judge on October 16, 1975. The petitioner, Thomas I'Anson appeared through his attorney Robert R. Beezer, of Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle; Maureen I'Anson appeared in person and through her attorney Charles V. Moren of Blackburn, Moren & Robinson. The court received a stipulation of the parties with respect to the ..... payment of costs for the care and litigation expenses of Thomas I'Anson incurred in obtaining damages for personal injuries to Maureen I'Anson. After the petitioner's opening statement, counsel for Maureen I'Anson moved to dismiss the proceedings on the ground that the petitioner's opening statement failed to state facts upon which relief could be granted. After considering the authorities submitted by counsel and finding that Maureen I'Anson does not suffer from any mental disorder, the court rendered an oral opinion granting the motion. therefore, in conformity with the stipulations of the parties and the court's ruling upon the motion, it is hereby

IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON

FOR KING COUNTY

ORDERED, ADJUDGED and DECREED as follows:

REEL 640 FRAME 1.186

- 1. The application for Letters Guardianship should be and the same hereby is denied without prejudice to any future applications.
- 2. That certain trust agreement executed by the parties and Pacific National Bank of Washington (Trust Account No. 16-2664-307) should be and the same hereby is declared terminated with the trust corpus and any accumulated income to be disposed of clear and free of trust as follows:
- (a) The trustee shall, on the next maturity date of the time certificate of deposit held in trust, pay to Thomas I'Anson the sum of \$22,558.90, said sum being computed by deducting the sum of \$11,441.10 in the hands of Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle from the sum of \$34,000.00. Upon payment of said sum from the trust and payment of the sums from the trust account at Schweppe, Doolittle, Krug, Tausend, Beezer & Beierle to Thomas I'Anson, Maureen I'Anson shall be released from any and all further liability to Thomas I'Anson for expenses incurred in caring for Maureen I'Anson and litigation of her personal injury claims.
- (b) The trustee shall, on the next maturity date of the time certificate of deposit held in trust, pay all the rest, residue and remainder of the trust principal and income to Maureen I'Anson Pangburn and thereupon said trust shall terminate.

Judgment - P. 2

Presented by: Charles V. Moren, of Blackburn, Moren & Robinson Attorneys for Maureen I'Anson Approved as to form and entry; notice of presentation waited: zer, of Schweppe, Dolittle, Krug, Tausend, Beezer & Beierle Attorneys for Petitioner 

Judgment - P. 3