



Anna Lee  
Officer  
Estate Settlement Officer II

Estate Settlement  
CA9-193-23-17  
333 South Hope Street, 23<sup>rd</sup> Floor  
Los Angeles, CA 90071  
T 213.861.5063 F 415.844.2768  
Anna.v.lee@bofa.com

March 12, 2021

Ms. Erin Christmas  
Riverside City and County Public Libraries  
3581 Mission Inn Ave.,  
Riverside, CA 92501

**Re: Family Trust of William M. McGregor, Jr. dated July 16, 1996**

Dear Ms. Christmas,

Mr. William M. McGregor passed away on October 17, 2020. Prior to his death, Mr. McGregor executed the Family Trust of William M. McGregor, Jr. dated July 16, 1996, which he amended on January 20, 2020. He named Bank of America, N.A. (the "Bank") as the Trustee in the event he was no longer able to serve. As a result of Mr. McGregor's death, the Trust is now irrevocable and the Bank has accepted the position of trustee. I am the Trust Officer who has been assigned to administer the Trust. My contact information is located above. During the administration, I will be working with my colleague Lin Hite, who can be reached at (213) 861-5148 and lin.hite@bofa.com.

I am writing to you because your organization has been identified as a party that was referenced as a remainder beneficiary of the Trust. This letter is intended to provide you with California Probate Code Section 16061.7 notice, which is required to be served by the trustee when a revocable trust becomes irrevocable upon the death of the settlor of a trust. As a party referenced in the Trust instrument, your organization is entitled to receive a copy of the notice, which is enclosed with this letter. I have also enclosed a copy of the Trust and First Amendment for your records.

Further, as an identified beneficiary, to support and expedite our administration, and in order to allow for the ultimate distribution of your interest, please provide the following information and return in the enclosed envelope:

- Delivery Instructions
- Estate and Trust Settlement Authorization Form
- A copy of your 501(c)(3).

Additionally, the following disclosures are enclosed as may be required by law and our policy. Please retain for your records.

- Estate Settlement Fee Schedule

**Investment products:**

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
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Trust and fiduciary services are provided by Bank of America Private Bank, a division of Bank of America, N.A., Member FDIC, and a wholly owned subsidiary of Bank of America Corporation ("BoFA Corp."). Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as "MLPF&S" or "Merrill") makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of BoFA Corp. MLPF&S is a registered broker-dealer, Member SIPC, and a wholly owned subsidiary of BoFA Corp.



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- Real Estate Services, Note & Mortgage Administration Services Fee Schedule
- Privacy Notice
- Affiliate Marketing Notice
- ISA Fact Sheet
- BRLF Funds Disclosure
- IAP/BR Fee Notice
- Business Continuity Planning Sheet

Please reach out to me if you have any initial questions about the Trust and our administration. I look forward to our future communications.

Sincerely,

Anna Lee  
Estate Settlement Officer

Enclosures

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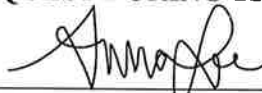
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**NOTIFICATION BY TRUSTEE UNDER CALIFORNIA  
PROBATE CODE SECTION 16061.7**

1. William M. McGregor, Jr. ("Settlor") and Trustee, executed the trust instrument dated July 16, 1996 ("Trust Instrument") that established the Family Trust of William M. McGregor, Jr., dated July 16, 1996 ("Trust"). The Trust was amended on January 20, 2020.
2. The Settlor died on October 17, 2020. Upon the Settlor's death, the Trust Instrument provides that the assets of the Trust will be allocated among twelve charities.
3. Upon the death of William M. McGregor, Jr., the Settlor, the Trust is irrevocable.
4. The name, mailing address and telephone number of the Trustee of the Trusts is set forth below:

Trustee Name: Bank of America, N.A.  
Address: 333 South Hope Street, Suite 2300, Los Angeles, CA 90071  
Attention: Anna Lee  
Phone Number: 213-861-5063

5. The address of the physical location where the principal place of administration of the Trust is located: 333 South Hope Street, Suite 2300, Los Angeles, CA 90071.
6. You are entitled, upon reasonable request to the Trustee, to receive from the Trustee a true and complete copy of the terms of the Trust Instrument.
7. **YOU MAY NOT BRING AN ACTION TO CONTEST THE TRUSTS MORE THAN 120 DAYS FROM THE DATE THIS NOTIFICATION BY THE TRUSTEE IS SERVED UPON YOU OR 60 DAYS FROM THE DATE ON WHICH A COPY OF THE TERMS OF THE TRUST IS MAILED OR PERSONALLY DELIVERED TO YOU IN RESPONSE TO YOUR REQUEST DURING THAT 120-DAY PERIOD, WHICHEVER IS LATER.**

8.   
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Bank of America, N.A., as Trustee  
of the Family Trust of William M. McGregor  
dated July 16, 1996  
By: Anna Lee

3/12/2021  
\_\_\_\_\_  
Date