

## \$100,000 Plus Probate Account

**A**n account holder with a balance of more than \$100,000 had not maintained a current address with the Office of the Special Trustee for American Indians (OST), therefore, she became a Whereabouts Unknown (WAU) account holder. She was last known to live somewhere in the Northwest area.

Some detective work by OST staff members resulted in discovering the account holder's current name and last known city of residence. After it was determined the WAU account holder had passed on, an effort began to find an obituary or the cemetery where the late account holder was interred. A valuable lead from an online grave search led OST to the cemetery where the account holder had been laid to rest. The cemetery was not only able to provide a copy of the obituary but also a death certificate, which made it possible for OST to run a system report that located heirs of the estate.



*The moral of this story is two-fold.*

Without the dedication of OST personnel, those funds would probably still be sitting unused. It's only through everyday efforts by OST accounting technicians and other front line workers that these funds were able to be provided to the rightful heirs.

It's also a cautionary tale for account holders to keep their address information up-to-date. Know who you want to inherit your account and do some estate planning, which may simply mean having a will prepared or making a gift deed to your loved ones. *You* decide who is entitled to your funds and make it possible for your heirs to inherit without any delays.

To update any personal information about your account, call the Trust Beneficiary Call Center. The toll free number is 1-888-678-6836. The center is open Monday through Friday from 7 a.m. to 6 p.m. and Saturday from 8 a.m. to noon, Mountain time.

To get help with estate planning or for information about your account, contact your Fiduciary Trust Officer (FTO). You can locate your FTO online at [www.doi.gov/fto](http://www.doi.gov/fto).



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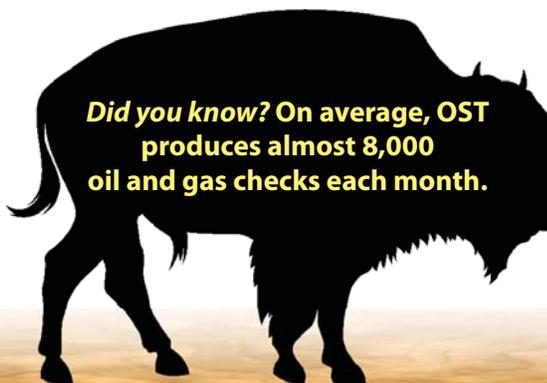
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**News Flash!** The White House has published a new website for Native American communities:

[www.whitehouse.gov/nativeamericans](http://www.whitehouse.gov/nativeamericans)

**Did you know? On average, OST produces almost 8,000 oil and gas checks each month.**



## Owner Management Opportunities: Estate Planning and Your Trust Land Ownership

*Can your adopted child inherit your trust property? Will the American Indian Probate Reform Act (AIPRA) impact inheritance of your trust lands? Is gift deeding is a good option for you?*

When you have assets, trust or non-trust, you should be the one to make decisions about those assets. Those decisions range from knowing if your trust land is leased to deciding who will inherit your property. As beneficial owner, you have the opportunity to manage your trust lands. But remember, decisions you don't make about your property leave others the opportunity to make decisions for you.

As of June 20, 2006, federal law (AIPRA) not state inheritance law controls who inherits your trust assets. Without a will, your spouse will inherit a life estate and the property may revert to your children or the tribe upon the spouse's death. Think about what that means to the spouse. Is that what you want? If your trust interest is less than five percent, only one person will inherit that interest. Do you want the operation of AIPRA to decide who inherits those interests?

Remember, good Indian estate planning covers more than just trust property. It also provides for your non-trust assets.

A will is a great way to record your estate planning decisions. Remember, you will die, with or without a will. However, without a will, you won't be the one to decide what happens to your property.

Don't let decisions happen by default!

Contact your Fiduciary Trust Officer (FTO) to find out how your estate may be affected by AIPRA and how you can make the most of owner management opportunities for your trust property. Locate your FTO online at [www.doi.gov/ost/fto](http://www.doi.gov/ost/fto).

If you have a specific question about your account or trust property, please contact the Trust Beneficiary Call Center, toll free, at 1-888-678-6836. Its operating hours are Monday to Friday, 7 a.m. to 6 p.m. and Saturday from 8 a.m. until noon, Mountain time.

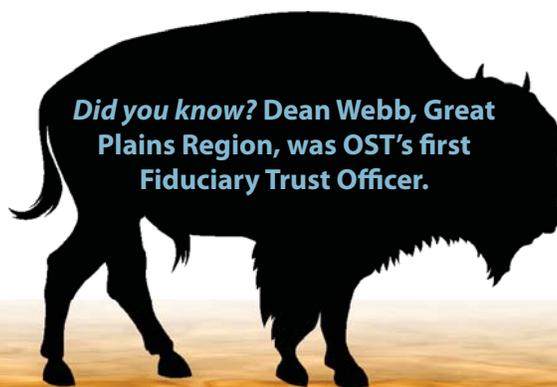


### Tribal Consultation Policy

The Office of the Special Trustee for American Indians (OST) continues to play a role with the Department of the Interior to take significant steps to implement President Obama's November 5, 2009, executive memorandum on tribal consultation. The Department's goal is to create a policy that replicates the best consultation practices, responds to the needs and constraints of tribal leaders participating in future consultations and promotes more responsible policy development for Indian country.

A joint tribal-federal team collaborated to write the Department's draft consultation policy, which was provided to tribal leaders with a 60-day period to comment. Subsequently, on May 17, 2011, the policy was published in the *Federal Register* for public comments through July 18, 2011. At the conclusion of the public comment period, the tribal and federal co-chairs and Department leadership assessed the public comments and prepared the policy for Secretary Salazar's consideration.

OST team members include Patricia Gerard and Lee Frazier, with OST's Office of External Affairs. Ethel Abeita, Director of OST's Office of Trust Records, was an active initial member.



## Office of Appraisal Services Information System (OASIS)

Early this year, work began on an electronic application to manage the volume of appraisals being requested from the Office of the Special Trustee for American Indians Office of Appraisal Services (OAS). That application is named Office of Appraisal Services Information System (OASIS). It is being written and designed using the latest software technologies.

OASIS will make it possible for clients to electronically input appraisal service requests as well as upload supporting documentation. Requests advance to OAS Regional Supervisory Appraisers (RSAs) for acceptance. Clients will be able to track requests as they make their way through the appraisal/review process.

This system will give RSAs the ability to determine resources needed to meet work

load requirements. They will be able to evaluate types of appraisal services being requested, appraisal staff requirements and contractor performance. OASIS will give management a real-time overview of work being performed in the field.

OASIS is being phased into production. Phase one includes writing the initial application and then testing input of appraisal service requests at OAS regional offices. This testing is scheduled for late summer in 2011. In the future, after full implementation of phase one, phase two will be developed to address reports needed by management. Phase three will tackle appraisal reporting capabilities.

For more information about OASIS and appraisal requests, call 505-816-1318.

## Ray Joseph Meets Tribal Leaders

Principal Deputy Special Trustee (PDST) Ray Joseph has taken the opportunity to meet as many tribal leaders as possible since he joined the Office of the Special Trustee for American Indians (OST) in January 2011. Each meeting has broadened effective communications and provided an opportunity to voice OST's goals of supporting collaboration, consultation and cooperation.

In addition to a phone conversation with Confederated Salish and Kootenai Tribes Chairman Moran in March, a meeting with InterTribal Monitoring Association leaders in April, and Tribal/Interior Budget Council meetings in March and May, the PDST also took the opportunity to attend the South Dakota Indian Business Conference in May. At that conference, he

was joined in local media interviews by Tanya Fiddler, a board member of the conference's sponsoring organization (South Dakota Indian Business Alliance), and JR LaPlante, the first Secretary of Tribal Relations for South Dakota. He held discussions throughout the day with entrepreneurs attending the conference and talked with financial leaders during breakout sessions and workshops. When not in sessions, Mr. Joseph met with tribal leaders and discussed the importance of field offices and Fiduciary Trust Officers assisting the tribes.

PDST Joseph plans to attend tribal and government events throughout the summer and fall. Perhaps he will see you at one of those venues. If so, please say hello and bring to his attention any issues that affect the fiduciary trust. To reach him at his office, call 202-208-4866.



**Did you know? OST has printed several checks for over a million dollars for IIM beneficiaries.**



**Did you know? OST has decreased its budget request each year for the past 6 years.**

## Record Number of Tribal Government Employees Attend Records Management Conference

The Office of the Special Trustee for American Indians 4th annual records management conference was a terrific success, with a significant increase in the number of attendees. This year's conference saw the largest increase in the number of tribal attendees — 66 compared to 36 last year. The increase was due largely to the Office of Trust Record's (OTR) decision to structure conference workshops in line with tribal records management needs. The conference was held June 6-9, 2011, at the National Indian Programs Training Center in Albuquerque, New Mexico.

The conference provided 82 workshops in three course tracks. This year, OTR provided records information training in workshop settings rather than in-depth training in fewer subjects. Seventy-two percent of attendees who participated in the records management program for tribes responded to the evaluation survey as strongly agreeing that the session increased their knowledge and/or skills and they were likely to use some or all of the information provided at their workplace.

Tribes represented at the conference included the Cheyenne River Sioux Tribe, Colorado River Indian Tribe, Confederated Salish & Kootenai Tribes, Flandreau Santee Sioux, Hopi Tribe, Mescalero

Apache, Navajo, Northern Cheyenne Tribe, Oglala Sioux, Omaha Tribe of Nebraska, Oneida Tribe of Indians of Wisconsin, Pine Ridge, Pueblo of Zuni, Quil Ceda Village of Washington, San Carlos Apache, Santa Clara Pueblo, Shingle Springs Rancheria, Shoshone-Bannock Tribes, Susanville Indian Rancheria, Winnebago and others that were not

identified by their tribal representatives. A few participants travelled from as far away as Alaska.

For more information about the conference or records management training for your office, call 505-816-1620.



OTR employees staff the registration table



Associate Principal Deputy Special Trustee Donna Erwin addressed attendees



Conference attendees receive certificates for completing training at the conference



Did you know? The American Indian Records Repository is approximately 90 feet underground.



Did you know? 2,016 cubic feet of space is reserved at AIRR for contracting and compacting tribes to store their trust documents.