

# TRUST MATTERS

Department of the Interior  
Office of the Special Trustee  
for American Indians

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## Beneficiaries With Assets in Reformed Regions Get More Detailed Account Statements

Staff members at OST and BIA continue to reform trust processes, systems, and services across the nation. Account holders with assets managed at agencies that have been converted to the new leasing system and reformed trust processes are receiving account statements that include additional information, as listed below. When all regions are converted, and all systems are current with their data (early in 2008), all individual Indian trust beneficiaries will receive these expanded statements.

The new Account Statements include:

- the date of each account transaction during the quarterly statement period;
- cash receipts and disbursements (funds coming into and out of the account), including the names of payors, types of lease and sources of payment;
- account beginning and ending balances for the statement period.

The new Real Property Asset Statements provide information about the land that each account holder owns including:

- the number of acres in a tract of land;
- the location of a tract, including the county and state;
- the undivided interest or percentage of the tract owned;
- the type of ownership a beneficiary has in the property, whether an account holder owns the title to the interest but does not receive the income from the interest, or if they have “beneficial ownership,” (account holder doesn’t own title, but receives financial benefits);
- the encumbrances (lease, right-of-way, or other legal instrument) that authorize property usage;
- the encumbrance holder, or person or entity paying for the use of the property;
- the effective and expiration dates for the terms of a lease; and
- the tract ID number and the tract description or official name, if any, of a tract of land.

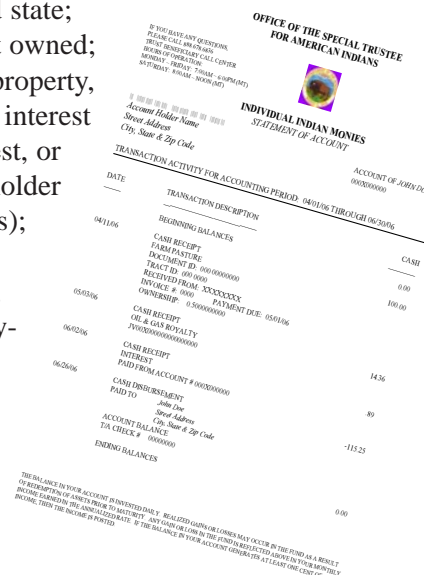


## A New Focus to Fixing Fractionation

The Indian Land Consolidation Program (ILCP) has developed a new strategy, approved by the Department earlier this year, to target the purchase of interests on reservations with the most highly fractionated tracts (more than 200 interest owners). The following reservations contain the most highly fractionated tracts (1,577 all told):

- Bad River, WI
- Bois Forte, MN
- Crow, MT
- Fond du Lac, MN
- Ho Chunk, WI
- Keweenaw Bay, MI
- Lac Courte Oreilles, WI
- Lac du Flambeau, MN
- Navajo, (NM only)
- Pine Ridge, SD
- Quapaw, OK
- Red Cliff, WI
- Rosebud, SD
- Spirit Lake, ND
- Standing Rock, SD
- Sisseton, SD
- Wind River, ID
- Winnebago, NE

For more information, contact ILCP at (715) 682-0310.



**Tickertape: Media Matters ...** Professor David M. English, a member of the Office of the Special Trustee’s Advisory Board and professor at the University of Missouri-Columbia, has written an extensive article titled “A Uniform Probate Code for Indian Country, at Last.” Published in the American Bar Association’s magazine *Probate & Property*, the article explains the intricacies of the new American Indian Probate Reform Act. The article is available on the External Affairs page on the Trust Portal, or online at [www.abanet.org/rppt/publications/magazines/2006/ma/english.html](http://www.abanet.org/rppt/publications/magazines/2006/ma/english.html).

## Indian Affairs Training Center Up and Running in Albuquerque

Last spring the Department of the Interior opened the new National Indian Programs Training Center in Albuquerque, NM. The facility, dedicated to former Secretary of the Interior Manuel Lujan, Jr., is an education center for Interior's Indian Affairs programs-including trust programs, social services, law enforcement, education, and more. Since it opened, the center has held 94 classes, and enrolled 2,833 employees from BIA, OST and tribes. Trust-related classes have included a series of financial trust management courses sponsored by OST and Cannon Financial Institute as well as training for the Trust Asset and Management System (TAAMS). Staff at the Center is developing a state of the art audio visual system that will eventually reach all Indian Affairs regions. Additionally, computer training labs are launching new applications, including the Native American Student Information System, a database capturing information on students in BIA schools. More than 500 BIA teachers are expected to complete training on this system by the end of December of 2006.



Opening ceremonies for the new National Indian Programs Training Center were held in April of 2006. Inside the new Center, along with requisite classrooms and training facilities, are a number of exhibits about Native American history and culture.

### National Indian Programs Training Center: Just the Facts

**Mission:** Provide state-of-the-art training to individuals who are committed to fulfilling the government's responsibilities to Indian Country

**Training offered:** Broad range of leadership and career development courses

**Broadcast learning studio:** Training and information sharing capabilities via digital broadcasting systems

**Seating capacity:** 552

**Classrooms:** 11

**Breakout and meeting rooms:** 7

**Computer labs:** 5

**Number of computers:** 43

**Square footage:** 50,000

**Print shop:** Print and duplication services to produce course materials in-house

**Projected number of employees:** 15

**Annual budget:** \$2,000,000

**President:** Ms. Dolores Chacon

**Director:** Ms. Michelle Pelletier

**Address:** 1011 Indian School Road, NW, Albuquerque, NM 87104

**Telephone number:** (505) 563-5400

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**Tickertape: Rolling Out Reforms** ... So far OST and BIA staff have converted the Southern Plains, Great Plains, Rocky Mountain and Navajo regions and certain agencies in the Northwest, Pacific, Eastern Oklahoma and West to new trust management systems. The converted offices account for approximately *80 percent of all recurring dollars* that flow through the Indian trust, and more than *70 percent of accounts* managed by Interior. ... **Probate Update:** For the first time since OST took over the distribution of probate assets in 2004, the Trust Funds Management group has brought the distribution process current. When completed probate files reach OST, they are now processed within the targeted 10-day goal. Congratulations!

## Trust Officers Keep Up the Good, Hard Work

Today 51 of 52 OST Fiduciary Trust Officer positions are filled. Every day, these 51 employees and their staff members are in the field working with trust beneficiaries. Some recent examples: **Tim Lake** and **Lisa Gonsalves** staffed a booth at the Sisseton Pow Wow in South Dakota and worked with beneficiaries to help answer their questions and help them understand their accounts. **Rebecca Clarke** at the Pima Agency in Arizona is reaching out to minors and their parents and guardians in her region to help them understand their accounts.

FTOs and staff are also making great strides finding whereabouts unknown (WAU) beneficiaries. **Clarissa Bright Wings** at Crow Agency, Montana, located an elderly woman who had almost \$90,000 in her account. Bright Wings and FTO **Kevin Bailey** were able to work with the local BIA Social Services staff to establish a supervised account and ensure the beneficiary's best interests were addressed. In March, Crow Agency staff found five WAU beneficiaries with a total of \$108,545. **David Jenkins**, at the Horton Agency in Kansas, confirmed that a local man was a WAU who had been adopted at birth. Jenkins worked with the man to prove he was the rightful owner of the account, and then sent him to his tribe's offices because Jenkins knew the tribe may be holding judgment or per capita funds on his behalf. The beneficiary was overwhelmed with the amount of funds; he paid off his home and kept the rest to use for retirement. Staff at the Horton Agency had a very successful year, finding WAU beneficiaries with a total of more than \$280,000. **Karen Whitenton** and her staff in Carson City, NV, found one of their top 100 WAUs with help from a WAU beneficiary's grandparents. It turned out the beneficiary had more than \$40,000 coming his way. With three small children, he assured Whitenton the money was much needed.



Lisa Gonsalves (right) staffs an OST outreach booth at the Sisseton Pow Wow in South Dakota.

## New Publications Offer Information to Indian Trust Account Holders and Tribes

OST has produced three new publications for both individual Indian trust beneficiaries and tribes.

• **Welcome to the Indian Trust: A Guide for New Account Holders** is a booklet that includes comprehensive information from

how accounts are established to how to sign up for Direct Deposit. These new booklets should help new Individual Indian account holders better understand their accounts.

• **Individual Indian Money Account Information** is a brochure that offers beneficiaries information on how accounts are invested, how money comes into and is disbursed from accounts and where to find more information. • **Trust Reform Systems and Services Available for Self-Determination and Self-Governance Tribes** provides information to tribes that manage their own trust programs through agreements with Interior. The pamphlet explains what new systems and processes are available to self-governance and self-determination tribes.

These publications are available on the Office of External Affairs Trust Portal page, or by calling External Affairs at (505) 816-1081.



**Tickertape: Around OST ...** OST has been working with new self-governance tribes accepted into the program in 2006. The **White Earth Tribe** of Minnesota has chosen to manage the OST appraisals program, the **Washoe Tribe** of California and Nevada is considering managing appraisals, and the **Taos Pueblo** in New Mexico is considering managing both the beneficiary process and appraisal programs. Almost 40 tribes contract or compact OST's programs. ... **The D.C. Scene:** **Carl Artman**, Associate Solicitor and a member of the Oneida Tribe of Wisconsin, has been nominated as Assistant Secretary-Indian Affairs. In fall, Artman's nomination was approved by the Senate Indian Affairs Committee. At press time, a final vote before the Senate had yet to be scheduled.

## Around the Department of the Interior

# BLM Milestone: The Last Serialized Patent Gets Imaged and Scanned and the History of the Settlement of the West goes High-Tech

By Peggy Riek, BLM-Eastern States, External Affairs

The final original serialized land patent, issued for 80 acres in Wisconsin, was scanned at the Bureau of Land Management (BLM)-Eastern States office earlier this year. This feat marks the end of the second phase of electronic scanning and indexing for nearly 1.25 million post-1908 land patents that were issued for the "30 Public Land States," or states that were not included in the original 13 colonies. The electronic version of this final land patent can be seen at [www.glorerecords.blm.gov](http://www.glorerecords.blm.gov). In fact, more than 4.2 million records are available on this site. Over 3,163,200 land patent records have been scanned, indexed, imaged and posted to the web site since the project began in 1989.

Title companies, historians, genealogists, and others are now able to view these historical records that provide the public with a wealth of historical data, and essentially tell the story of the settlement of the West.

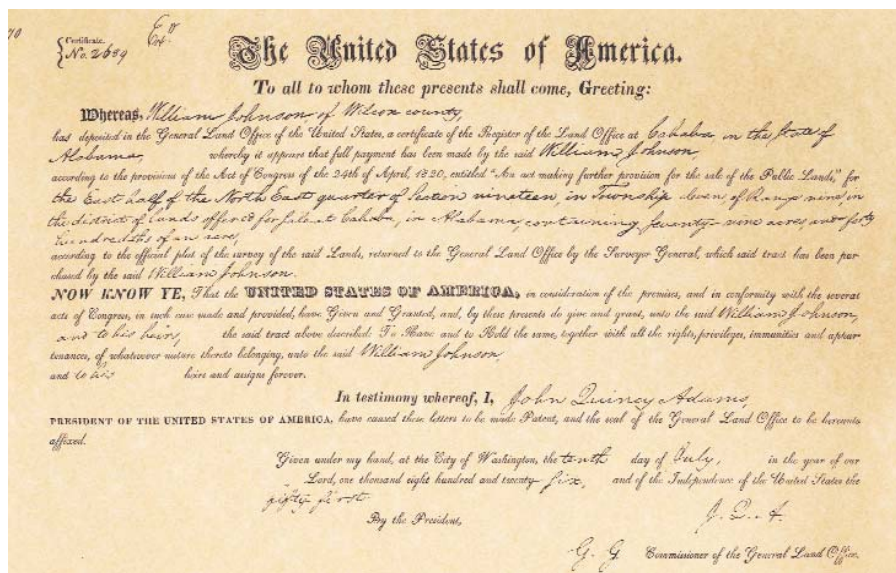


Photo by Bill Davenport.

This land patent was issued to William Johnson for 79.40 acres in Alabama and signed by John Quincy Adams in 1826. Other records housed at BLM include documents signed by George Washington, James Madison, and Theodore Roosevelt and military warrants issued to companions of Lewis and Clark during their expedition. In February of 2006, BLM-Eastern States Legal Instrument Examiner Dave Meinke (above right) scanned the final serialized patent for 80 acres in Wisconsin. The General Land Office Automation Team has scanned and indexed 3,163,201 land patent records.

Today, the BLM-Eastern States office is the largest public land title holder in the world. As the successor agency to the original General Land Office, BLM-Eastern States maintains more than 9 million historic land documents including survey plans and field notes, homestead certificates, cash patents, military warrants, and railroad grants. These records were among the very first land records developed from the Land Ordinance of 1785, which authorized the transfer of public lands to private individuals. (The General Land Office was established within the Treasury Department in 1812 to take charge of all survey and land title records. The office became part of the new Department of the Interior in 1849; it merged with the U.S. Grazing Service in 1946 to form the Bureau of Land Management.)

Over the years, these historic land patent books were continually used by BLM, federal and state agencies, title insurance companies, and researchers. The long use of these books caused tremendous wear and tear, despite the efforts of artisan bookbinders to help maintain them. BLM faced an urgent need to preserve and protect these records but still ensure their availability for research. In 1989, BLM-Eastern States launched this unique project, the General Land Office Automated Records Project, to copy these priceless documents onto laser disks. Once copied, these historic documents were stored in acid-free boxes in climate-controlled vaults. BLM expanded the General Land Office Automated Records System by making the historic patents available to the public online. The second phase of the project included automating Federal land grant records from July 1, 1908, when the General Land Office centralized the issuing of land patents out of their Washington office, until the early 1970s when this practice reverted to the various BLM state offices.

"The Web site remains one of the most popular Web sites at the Department of the Interior. It offers customers the ability to easily research and query the General Land Office database by name, land description, and county, and view and print these historic documents from their homes or offices," said BLM-Eastern States Director Mike Nedd.

To view the historical documents, go to [www.glorerecords.blm.gov](http://www.glorerecords.blm.gov).