



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Age: 43 years	MARION F. AUSTIN and H.F. RICK LEAS, professional fiduciaries/conservators, of the person are petitioners.	NEEDS/PROBLEMS/COMMENTS: 1. Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required.
	Petitioners states they were appointed as [successor] conservators on 10/16/12.	
Cont. from	The report covers the period beginning 10/16/12 and ending 9/30/13.	
<input type="checkbox"/> Aff.Sub.Wit.		
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	Petitioners services include overseeing the conservatee's medical care, reviewing the conservatee's medications, arranging for in-home companion services, inspecting and arranging for update of Conservatee's personal residence, dealing with legal professionals associated with the restraining order of Conservatee's former boyfriend, dealing with family members, and assisting with Conservatee's personal care. Conservators - \$6,726.00 (per itemization and declaration for 56.05 hours @ \$120 per hour) Attorney - \$2,782.50 (per itemization and declaration for 10.5 hours @ \$265 per hour.) Costs - \$435.00 (filing fee)	
		Reviewed by: KT
		Reviewed on: 1/14/14
		Updates:
		Recommendation:
		File 1A – Hood

1B Erin L. Hood (CONS/PE)

Case No. 0389050

Atty Jaech, Jeffrey A. (for Petitioner/Conservator of the Estate/ Westamerica Bank)

Atty Winter, Gary L (for Conservators of the Person Marion Austin and H.F. Rick Leas)

(1) Third Account and Status Report of Conservator of the Estate and (2) Petition for Settlement Thereof, for Compensation for Conservators of the Person and Estate, and for (3) Attorneys Fees

Age: 43 years	<p>WESTAMERICA BANK, Conservator of the Estate, is petitioner.</p> <p>Account period: 9/1/11 – 8/31/13</p> <p>Accounting - \$1,269,067.88 Beginning POH - \$ 842,580.03 Ending POH - \$ 899,728.37</p> <p>Former Conservator of the Person Edwina Woolard - \$825.00 (55 hrs at \$15.00 per hour)</p> <p>Conservator Westamerica Bank - \$15,718.07 (1% of the market value of the assets)</p> <p>Petitioner request that beginning on 9/1/13 the Conservator of the estate be allowed to pay itself monthly 50% of the compensation so computed with the balance payable at the next accounting.</p> <p>Attorney - \$20,781.00 (per itemization and declaration for the second account and general administrative matters)</p> <p>Attorney Lerandeau & Lerandeau - \$25,281.70 (per itemization for assisting in obtaining restraining order against the conservatee's former boyfriend and a restraining order against the minor child's father)</p> <p>Costs - \$896.00 (filing fees & certified copies)</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from		<p>Note: If the petition is granted, a status hearing will be set as follows:</p> <ul style="list-style-type: none"> Friday, October 2, 2015 at 9:00 a.m. in Department 303, for the filing of the fourth account. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
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		<p>Reviewed by: KT</p> <p>Reviewed on: 1/14/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1B – Hood</p>

1B

Atty Sharon, Randolph M. (for Petitioner/Trustee Wells Fargo Bank)

Petition for Authorization to Purchase Specially Equipped and Handicapped Accessible Vehicle Which Will be Used to Transport the Beneficiary; Petition for Approval of Attorney's Fees; Declaration of Randolph M. Sharon

Age: 7 years		<p>WELLS FARGO, Trustee, is petitioner.</p> <p>Petitioner states that the Beneficiary suffers from severe disabilities and is wheelchair bound.</p> <p>The vehicle currently used to transport the beneficiary [a 2008 GMC Acadia] is not well suited to accommodate the Beneficiaries special needs. The maintenance and repairs expense have been very high. Petitioner believes that further expenses to the vehicle are not reasonable; and that it would be best to purchase a new vehicle. More importantly, the current vehicle does not have any handicap modifications and cannot accommodate a wheelchair.</p> <p>Petitioner requests the authority to spend up to \$75,000.00 to purchase 2014 Honda Odyssey that will be specially equipped to and handicapped accessible. In order to avoid liability to the Trust, petitioner requests that title to the vehicle be in the name of the Beneficiary's mother, Cindy Gamez; and that the Trust have a lien on the vehicle in order to secure the purchase price. The Trust will have the responsibility for the payment of registration, insurance, maintenance and repair.</p> <p>Petitioner further requests attorney fees in the sum of \$2,000.00 [5 hours @ \$400.00 per hour] and reimbursement of costs of \$200.00 for the filing fee.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: At the time of hearing for the second account a status hearing was inadvertently not set. Therefore the Court will set a status hearing as follows:</p> <ul style="list-style-type: none"> Friday, April 17, 2015 at 9:00 a.m. in Department 303, for the filing of the third account <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>	
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<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 1/14/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3 - Gamez</p>		

Age: 18	GARY and SHANA SCHAFFER , Uncle and Aunt, and Guardians of the Person and Estate, are Petitioners.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED TO 02/06/14</u> Per attorney request 1. Property on hand at the close of the last account period (9-30-12) was <u>\$121,995.83</u> ; however, Petitioner states the property on hand at the beginning of this account period (10-1-12) was <u>\$112,753.23</u> . Need clarification regarding the discrepancy of <u>\$9,242.60</u> . 2. Petitioners state <u>the guardians have directed</u> the establishment of the trust. The trust, however, appears to indicate that Kaleb Schafer is the settlor. The Court may require clarification or authority regarding the guardians' directing establishment of the trust, since Kaleb has reached the age of majority, or verification that Kaleb wishes to transfer the guardianship estate funds to this trust. (<i>Note: This is <u>not</u> a trust funded by Court order as contemplated by the Probate Code and/or Cal. Rules of Court and does not require further Court oversight, accounting, etc.</i>) 3. Court records indicate a balance due of \$730.00 for unpaid court investigation fees from the establishment of the guardianship. Need payment of \$730.00 prior to distribution. 4. Need order. Order should reflect the dollar amount of the actual distribution after payment of the authorized fees and Court fees. 5. In addition to the order settling the account, need Order for Withdrawal of Funds from Blocked Account (MC-358). Reviewed by: skc Reviewed on: 01/14/14 JF Updates: Recommendation: File 4 – Schafer
Cont. from 112113	Account period: 10-1-12 through 10-1-13	
Aff.Sub.Wit.	Accounting: \$154,587.68	
✓ Verified	Beginning POH: \$112,753.23	
Inventory	Ending POH: \$152,952.68 (cash)	
PTC	Guardians: not requested	
Not.Cred.	Attorney: \$1,250.00 (per local rule)	
✓ Notice of Hrg	Attorney (Trust preparation): \$2,750.00	
✓ Aff.Mail	Petitioners state that because the guardianship estate will be terminated, the guardians have directed the establishment of a trust for the benefit of Kaleb Schafer (attached Exhibit D) prepared by Attorney Stephen Denning. Petitioners request the Court authorize payment to Attorney Denning from the guardianship estate.	
Aff.Pub.	Petitioner prays for an order:	
Sp.Ntc.	1. Approving, allowing, and settling the third and final account;	
Pers.Serv.	2. Authorizing attorney fees to Attorney Nancy Stegall;	
Conf. Screen	3. Authorizing attorney fees to Attorney Stephen Denning for legal services related to trust agreement;	
Letters	4. Approving the funding of the trust with the balance of the funds contained in the blocked guardianship estate account of \$152,852.68.	
Duties/Supp		
Objections		
Video Receipt		
CI Report		
✓ 2620(c)		
Order	X	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Petition for Order Allowing Attorney's Fees and Costs

Age: 87	<p>TIMOTHY LARSON, Petitioner, is the attorney for William T. Golden, Conservator of the Person and Estate.</p> <p>William T. Golden, was appointed as Conservator of the Person and Estate on 06/24/13.</p> <p>Inventory & Appraisal filed 09/03/13 - \$180,828.34</p> <p>Petitioner requests fees in connection with the legal services on behalf of Mr. Golden from 04/23/13 – 10/31/13 for the benefit of the Conservatee.</p> <p>Petitioner asks that he be paid from the Conservatorship estate for 7.50 attorney hours and 20.90 paralegal hours totaling \$5,128.50, plus costs in the amount of \$941.68, for a total fee request of \$6,070.18.</p> <p>Services are itemized by date and include preparation and review of documents, visits with client, and court appearances.</p>	NEEDS/PROBLEMS/COMMENTS:
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<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 01/14/14
		Updates:
		Recommendation:
		File 5 – Steele

6A
Atty
Atty
Atty
Atty

Dale W. Balagno Revocable Trust
Armo, Lance E. (for Joseph Balagno – Beneficiary – Petitioner)
Gromis, David Paul (for Nicholas Kovacevich – Former Trustee)
Kruthers, Heather (for Public Administrator)
Motsenbocker, Gary L. (for Mary Pond – Respondent)

Case No. 13CEPR00389

Status Hearing Re: Assets and Accounting

	PUBLIC ADMINISTRATOR was appointed as Trustee pursuant to Minute Order 9-9-13.	NEEDS/PROBLEMS/COMMENTS:
	The Court set this Status Hearing Re: Assets and Accounting.	<u>Continued from 12-9-13</u>
Cont. from 120913	HISTORY:	A: Continued Status Hearing Re Assets and Accounting
Aff.Sub.Wit.	JOSEPH BALAGNO , Beneficiary, filed a Petition to Remove Trustee, to Appoint Public Administrator as Trustee, and to Compel Trustee to Account.	B: Petition for Payment of Attorney's Fees & Payment for Trustee's Fees filed by Former Trustee Nick Kovacevich
Verified	NICHOLAS T. KOVACEVICH , Trustee, filed a Declaration on 8-8-13 (prior to Settlement Conference) indicating information provided to Petitioner's attorney.	C: Petition for Court Order to Determine Title and Require Transfer of Personal Property to Petitioner filed by Beneficiaries Joseph Balagno, Linda Balagno, and Lori Jo Brown as Petitioners (Beneficiary Mary E. Pond as Respondent.)
Inventory	Minute Order 9-9-13: The Court is informed that Mr. Kovacevich has agreed to step down. The Court grants the petition and appoints the Public Administrator as the personal representative. The Court directs that any fees come before the court. Parties stipulate to having the minute order become the order of the court. Set on 12-9-13 for status hearing re assets and accounting.	Note: The former trustee filed a petition for fees for himself and for his attorney (Page B); however, no accounting or status report has been filed regarding the assets. Therefore, this status hearing remains on calendar.
PTC	On 11-1-13, Attorney David Paul Gromis , Attorney for former trustee Nicholas Kovacevich, filed a Petition for Payment of Attorney's Fees and Payment for Trustee's Fees that is set for hearing on 12-19-13. The petition requests payment of \$5,976.00 from the trust estate to the attorney and \$16,452.00 from the trust estate to Nick Kovacevich, CPA, for services as successor trustee.	1. Need status of assets and accounting from former trustee Nicholas Kovacevich.
Not.Cred.	In addition, on 11-18-13 , Joseph Balagno, Linda Balagno, and Lori Jo Brown filed a Petition for Court Order to Determine Title and Require Transfer of Personal Property to Petitioner that is set for hearing on 1-16-14.	Reviewed by: skc
Notice of Hrg		Reviewed on: 1-14-14
Aff.Mail		Updates:
Aff.Pub.		Recommendation:
Sp.Ntc.		File 6A – Balagno
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
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Aff. Posting		
Status Rpt		
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Citation		
FTB Notice		

6A

(1) Waiver of Accounting and (2) Petition for Final Distribution Under Will and (3) for Allowance of Statutory Attorney's Fees

DOD: 03/10/12		<p>DOUGLAS J. COOPER, Executor, is Petitioner.</p> <p>Accounting is waived.</p> <p>I & A - \$165,000.00 POH - \$165,000.00 (all real property)</p> <p>Executor - waived</p> <p>Attorney - \$5,950.00 (to be paid outside of the estate)</p> <p>Distribution, pursuant to decedent's will, is to:</p> <p>Douglas J. Cooper, as Trustee of the Douglas J. Cooper and Robyn L. Cooper Revocable Living Trust - Real property valued at \$165,000.00</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
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<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 01/14/14</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 8 – Cooper</p>	

10 Cathleen Hawk (CONS/PE)
 Atty Sanoian, Joanne (for Carl Hawk – Conservator)
 Atty Rindlisbacher, Curtis D. (Court Appointed for Conservatee)

Case No. 11CEPR00850

Probate Status Hearing Re: Failure to File Inventory and Appraisal; Failure to File First Account

Age: 51	CARL HAWK , husband, was appointed Conservator of the Person and Estate on 10/27/11. Letters of Conservatorship were issued on 10/28/11. Inventory & Appraisal was due in March 2012. The First Account was due in October 2012.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 09/27/13</u> As of 01/14/14, nothing further has been filed in the matter and the following items remain outstanding: 1. Need Inventory & Appraisal. 2. Need First Account and Report of Conservator.
Cont. from 022213, 062813, 092713		
Aff.Sub.Wit.	Status Hearing Report filed 06/20/13 states: The conservatee is to receive a profit sharing distribution from her previous employment at Simonian Packing Company. No distributions have been made to the conservatee as of yet and the conservator has been informed that there is an ongoing investigation by the Department of Labor arising from complaints with the profit sharing plan. Eric Tristan, investigator with the Department of Labor stated on 06/20/13 that the investigation is still on-going. He further indicated that it is a large investigation involving numerous parties, but that he is hopeful it will resolve soon. As the investigation is still ongoing, the conservator has still not been able to take possessions of any assets of the conservatorship estate and therefore is unable to file an Inventory & Appraisal or Accounting. A continuance of 90 days is requested. Status Hearing Report filed 09/25/13 states: According to Eric Tristan, the Department of Labor investigator handling the investigation regarding the proposed conservatee's profit sharing plan, the investigation remains ongoing and there is no set date that the investigation will be resolved, but he hopes it will be in the near future. Petitioner therefore requests a 90 day continuance.	Reviewed by: JF Reviewed on: 01/14/14 Updates: Recommendation: File 10 - Hawk
Verified		
Inventory <input checked="" type="checkbox"/>		
PTC		
Not.Cred.		
Notice of Hrg		
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Status Rpt		
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Citation		
FTB Notice		

	<p>JENNIFER SANCHEZ, Maternal Aunt, was appointed Guardian of the Estate on 3-6-13 without bond, funds blocked.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
<p>Cont. from 101013, 111413</p>	<p>The petition originally anticipated receipt</p>	<p><u>Continued from 10-10-13, 11-14-13</u></p>
<p>Aff.Sub.Wit.</p>	<p>I&A Partial No. 1 was filed 4-18-13 consisting of personal property valued at \$17,255.00.</p>	<p><u>Note:</u> There were no appearances at the hearing on 11-14-13.</p>
<p>Verified</p>	<p>I&A Partial No. 2 was filed 8-26-13 consisting of CalSTRS proceeds of \$5,955.33.</p>	<p>1. Need Final I&A or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
<p>Inventory</p>	<p>A Final I&A has not yet been filed.</p>	
<p>PTC</p>	<p>Notice of Taking Possession or Control of an Asset of Minor was filed 6-24-13 at the request of the insurance company.</p>	
<p>Not.Cred.</p>	<p>A Status Hearing Report filed 9-3-13 states Ms. Sanchez has received two checks from CalSTRS, which include retroactive benefits, which checks have been deposited to the blocked guardianship estate account. Receipt attached as Exhibit B.</p>	
<p>Notice of Hrg</p>	<p>Ms. Sanchez has been awaiting funds from the mother's life insurance policy with Great American Life Ins. Company, which will be deposited to blocked account upon receipt. The report requested 45 days.</p>	
<p>Aff.Mail</p>	<p>On 9-5-13, the Court reset the status hearings scheduled for 9-6-13 to 10-10-13 pursuant to request.</p>	
<p>Aff.Pub.</p>	<p>On 10-10-13, this status hearing was continued to 11-14-13. On 11-14-13, there were no appearances and the matter was continued to 1-16-14.</p>	
<p>Sp.Ntc.</p>	<p>As of 1-14-14, nothing further has been filed.</p>	
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
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<p>Status Rpt</p>		
<p>UCCJEA</p>		
<p>Citation</p>		
<p>FTB Notice</p>		
		<p>Reviewed by: skc Reviewed on: 11-7-13 Updates: Recommendation: File 12 - Navarro</p>

13A Stella Ferri (Estate)

Case No. 13CEPR00159

Atty Ferri, Sabino J.L. (pro per – son/co-Executor)

Atty Ferri, Pasqua Carmela (pro per – daughter/co-Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 05/23/12	<p>SABINO J.L. FERRI and PASQUA CARMELA FERRI, son & daughter, were appointed as Co-Executors with Full IAEA and without bond on 04/23/13. Letters were issued on 04/24/13.</p> <p>Minute Order from hearing on 04/23/13 set this matter for status regarding filing of the Inventory & Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u> Final Inventory & Appraisal filed 01/03/14</p>
Cont. from 090613, 101113, 110113		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
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FTB Notice		
		Reviewed by: JF
		Reviewed on: 01/14/14
		Updates:
		Recommendation:
		File 13A – Ferri

13A

13B Stella Ferri (Estate)

Case No. 13CEPR00159

Atty Ferri, Sabino J.L. (pro per – son/co-Executor)

Atty Ferri, Pasqua Carmela (pro per – daughter/co-Executor)

Order to Show Cause Re: Failure to Appear

DOD: 05/23/12		<p>SABINO J.L. FERRI and PASQUA CARMELA FERRI, son & daughter, were appointed as Co-Executors with Full IAEA and without bond on 04/23/13. Letters were issued on 04/24/13.</p> <p>Minute Order from hearing on 04/23/13 set the matter for a status hearing regarding filing of the Inventory & Appraisal on 11/01/13.</p> <p>Minute Order from hearing on 11/01/13 states: No appearances. The court sets the matter for an Order to Show Cause on 01/16/14 regarding failure to appear. Sabino Ferri and Pasqua Ferri are ordered to be personally present on 01/16/14.</p> <p>Clerk's Certificate of Mailing filed 11/12/13 states that a copy of the Minute Order from 11/01/13 and Order to Show Cause was mailed to Sabino J. Ferri & Pasqua Ferri on 11/12/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
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Notice of Hrg			
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Citation			
FTB Notice			
		Reviewed by: JF	
		Reviewed on: 01/14/14	
		Updates:	
		Recommendation:	
		File 13B – Ferri	

13B

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 18		TEMPORARY EXPIRES 01/16/2014		NEEDS/PROBLEMS/COMMENTS:	
		GURSHARN MANGAT , mother is petitioner and requests appointment as conservator of the person, with medical consent powers.		The following issues remain:	
Cont. from 112113		Declaration of Manlin Jin, M.D.		Court Investigator Advised Rights on 11/01/2013.	
	Aff.Sub.Wit.		Voting Rights Affected	Voting Rights Affected need Minute Order.	
✓	Verified		Petitioner states:	1. Need Citation.	
	Inventory		1) Cereb Degen in Child Nos ICD – 9- CM 330.9	2. Need proof of personal service of the citation and a copy of the Petition on the proposed conservatee.	
	PTC		2) Lobectomy or Lung NEC 32.49	3. Need Notice of Hearing.	
	Not.Cred.		3) Acute and Chronic Respiratory Failure 518.84	4. Need proof of service at least fifteen (15) days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Conservator for:	
	Notice of Hrg	x	4) Respirator Dependent Status v 46.11	<ul style="list-style-type: none"> • Ripodaman S. Mangat (Father) • Avinder S. Mangat (Grandfather) • Kamua Jeet K Mangat (Grandmother) 	
	Aff.Mail	x	5) Tracheostomy v 55.0	Note: Declaration of Due Diligence filed 12/05/2013 for Avinder S. Mangat and Kamua Jeet Mangat states that petitioner cannot locate them and that they may be in India.	
	Aff.Pub.		6) Gastrostomy v 55.1	<ul style="list-style-type: none"> • Central Valley Regional Center per Probate Code § 1822 (e). 	
	Sp.Ntc.		7) Epi Par cont with intro Epi 345.21	5. Declaration filed 01/08/2014 includes a return receipt of mailing for Ripodaman S. Mangat however a proof of service on the mandatory Judicial Council Form is required.	
	Pers.Serv.			6. Need Video Receipt for conservator pursuant to Local Rule 7.15.8(A).	
	Conf. Screen			7. Confidential Screening form is incomplete.	
✓	Letters		Court Investigator Charlotte Bien's Supplemental report filed 11/05/2013.		
✓	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting			Reviewed by: LV	
	Status Rpt			Reviewed on: 01/14/2014	
	UCCJEA			Updates:	
	Citation			Recommendation:	
	FTB Notice			File 17 – Mangat	