



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.

(1) First Account and Report of Successor Trustee and (2) Petition for Allowance of Trustee Fees and Attorney Fees

Age: 16 years	<p>MARK E. OLSON, successor Trustee (Private Professional Fiduciary), is Petitioner.</p> <p>Account period: 07/31/10 – 07/31/12</p> <p>Accounting - \$463,686.15 Beginning POH - \$299,055.65 Ending POH - \$324,340.49</p> <p>Trustee - \$8,911.00 (\$7,799.00 has already been paid per Court order allowing compensation at \$350.00/month. Trustee requests approval for the remaining unpaid portion of \$511.00)</p> <p>Attorney - \$5,112.86 (per itemization and declaration for total fees in the amount of \$4,962.50 consisting of 18.9 hours broken down at .50 hr. @ \$175.00/hr., 7.30 hr. @ \$200.00/hr., 9.40 hr. @ \$300.00/hr., and 1.70 hr. @ \$350.00/hr. plus costs in the amount of \$150.36 for postage, photocopies and faxes)</p> <p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> Settling and allowing the first account as filed; Ratifying, confirming, and approving all of the acts and transactions of Petitioner as trustee; Allowing reasonable compensation to Petitioner for ordinary services rendered as trustee, in the total amount of \$8,911.00 for the period 07/31/10 – 07/31/12, of which \$511.00 remains unpaid to Petitioner; and Authorizing and directing trustee to pay Robert T. Haden Professional Corporation, the sum of \$5,112.86 from the trust estate as fees for services rendered from 09/01/10 – 11/20/12. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Property on hand shows that the trust owns a 2008 Ford Econoline E-250 Van. Automobile Expense shows varying monthly charges from 11/11 – 05/12 for a total of \$16,830.60 for "Van Rental". It is unclear why the trust rented a van when it owned a van. The Court may require more information. Schedule C-2 shows a disbursement to Sawyer Air Conditioning for \$10,900.00 for a HEPA unit for the house, however this item is not shown as an asset of the Trust on the Property on Hand schedule. The Court may require more information regarding this item. Petitioner is requesting total compensation of \$8,911.00 for the accounting period based on the Court's previous order authorizing \$350/month to the Trustee. Based on the \$350/month the compensation to the Trustee for the 24 month accounting period would be \$8,400.00 not \$8,911.00. Further Schedule C-3 of the accounting reflects disbursements to Mark Olson in varying amounts rather than even monthly payments of \$350.00. The Court may require more information. Schedule C-5 reflects reimbursements to Rafael Bustos for various amounts for mileage, vacation expenses, mariachi, 15th birthday party, clothing, outings, etc. The Court may require more information regarding these reimbursements. Attorney's request for fees and costs includes costs in the amount of \$150.36 for postage, photocopies and faxes; however, these costs are considered by the Court as part of the cost of doing business pursuant to Local Rule 7.17B.
DOB: 7/21/1996		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
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<input checked="" type="checkbox"/> Notice of Hrg		
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<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
Reviewed by: JF		
Reviewed on: 01/24/12		
Updates:		
Recommendation:		
File 1 - Bustos		

(1) Eleventh Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 2620; 2623; 2942]

Age: 45 years	PUBLIC GUARDIAN , Conservator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Friday, January 3, 2014 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>
	Account period: 11/1/11 – 10/31/12	
	Accounting - \$1,652,410.14	
Cont. from	Beginning POH- \$1,577,110.15	
Aff.Sub.Wit.	Ending POH - \$1,501,767.04	
<input checked="" type="checkbox"/> Verified		
Inventory	Conservator - \$3,050.52	
PTC	(6.96 Deputy hours @ \$96/hr and 8.80 Staff hours @ \$76/hr)	
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - \$1,250.00 (per Local Rule)	
<input checked="" type="checkbox"/> Aff.Mail		
Aff.Pub.	Bond fee - \$3,929.42 (o.k.)	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Petitioner prays for an Order:	
Letters	1. Approving, allowing and settling the eleventh account.	
Duties/Supp	2. Authorizing the conservator and attorney fees and commissions	
Objections	3. Payment of the bond fee	
Video Receipt		
CI Report	Court Investigator JoAnn Morris' Report filed on 6/13/12.	
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 1/24/13
		Updates:
		Recommendation:
		File 4 - Lopez

(1) Third Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 2620; 2623; 2640; 2942]

Age: 74 years	PUBLIC GUARDIAN, Conservator, is petitioner.		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Friday, January 9, 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> <p>Court Investigator's biennial review was due September 2012.</p>
	Account period: 10/26/10 – 10/25/12		
	Accounting	- \$87,473.93	
	Beginning POH	- \$29,332.26	
	Ending POH	- \$12,061.06	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory	Conservator - \$1,336.96	
	PTC	(6.96 Deputy hours @ \$96/hr and 8.80 Staff hours @ \$76/hr)	
	Not.Cred.		
✓	Notice of Hrg	Attorney - \$2,500.00 (per Local Rule)	
✓	Aff.Mail	W/	
	Aff.Pub.	Bond fee - \$203.50 (o.k.)	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	Petitioner prays for an Order:	
	Letters	4. Approving, allowing and settling the third account.	
	Duties/Supp	5. Authorizing the conservator and attorney fees and commissions	
	Objections	6. Payment of the bond fee	
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 1/14/13
			Updates:
			Recommendation:
			File 5 - Barquet

(1) Second and Final Account and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator And Attorney

DOD: 8/23/12	PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 8/28/08 – 8/23/12	
Cont. from	Accounting - \$24,729.67	
Aff.Sub.Wit.	Beginning POH - \$ 361.42	
<input checked="" type="checkbox"/> Verified	Ending POH - \$ 208.67	
Inventory	Subsequent account period: 8/24/12 – 10/28/12	
PTC		
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Accounting - \$2,288.67	
<input checked="" type="checkbox"/> Aff.Mail W/	Beginning POH - \$ 208.67	
Aff.Pub.	Ending POH - \$ 278.67	
Sp.Ntc.	Conservator - \$3,125.20 (26.30 Deputy hours @ \$96/hr and 7.90 Staff hours @ \$76/hr)	
Pers.Serv.		
Conf. Screen	Attorney - \$1,250.00 (less than allowed per Local Rule)	
Letters		
Duties/Supp		
Objections	Bond fee - \$50.00 (o.k.)	
Video Receipt	Petitioner request that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
CI Report		
9202		
<input checked="" type="checkbox"/> Order	Petitioner prays for an Order:	
Aff. Posting	7. Approving, allowing and settling the second and final account.	
Status Rpt	8. Authorizing the conservator and attorney fees and commissions	
UCCJEA	9. Payment of the bond fee	
Citation	10. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions	
FTB Notice		
		Reviewed by: KT
		Reviewed on: 1/24/13
		Updates:
		Recommendation:
		File 6 - Elerick

(1) Second and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 1860; 2620; 2623; 2630; 2942]

DOD: 9/16/2012	PUBLIC GUARDIAN , Conservator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Records show that this conservatorship has an outstanding balance due of \$766.00 for court investigation fees incurred on 5/1/2008.</p>
	Account period: 4/3/09 – 9/16/12	
	Accounting - \$41,543.13	
	Beginning POH - \$ 2,973.93	
	Ending POH - \$ 2,879.16	
Cont. from	Subsequent account period: 9/17/12-10/15/12	
Aff.Sub.Wit.	Accounting - \$4,948.88	
<input checked="" type="checkbox"/> Verified	Beginning POH - \$2,879.16	
Inventory	Ending POH - \$3,491.95	
PTC	Conservator - \$2,506.16	
Not.Cred.	(17.16 Deputy hours @ \$96/hr and 11.30 Staff hours @ \$76/hr)	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - \$1,250.00 (less than allowed per Local Rule)	
<input checked="" type="checkbox"/> Aff.Mail W/	Bond fee - \$87.50 (o.k.)	
Aff.Pub.	Petitioner request that due to the insufficiency of the estate to pay the fees and commissions that a lien be imposed upon the estate for any unpaid balances of the authorized fees and commissions.	
Sp.Ntc.	Petitioner prays for an Order:	
Pers.Serv.	11. Approving, allowing and settling the second and final account.	
Conf. Screen	12. Authorizing the conservator and attorney fees and commissions	
Letters	13. Payment of the bond fee	
Duties/Supp	14. Authorize petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions	
Objections		
Video Receipt		
CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Reviewed by: KT	
	Reviewed on: 1/14/13	
	Updates:	
	Recommendation:	
	File 7 - Donovan	

(1) Second and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and Attorney; and (3) Distribution [Prob. C. 1860; 2620; 2623; 2630; 2631; 2942]

DOD: 08/03/12		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 06/14/11 – 08/03/12	
Cont. from		Accounting - \$22,186.67	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$2,097.70	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$868.30	
<input type="checkbox"/>	Inventory	Subsequent account period: 08/04/12 – 09/07/12	
<input type="checkbox"/>	PTC	Accounting - \$4,927.72	
<input type="checkbox"/>	Not.Cred.	Beginning POH - \$868.30	
<input checked="" type="checkbox"/>	Notice of Hrg	Ending POH - \$4,927.72	
<input checked="" type="checkbox"/>	Aff.Mail w/	Conservator - \$1,276.72 (8.50	
<input type="checkbox"/>	Aff.Pub.	Staff hours @ \$76/hr. and 6.57 Deputy hours @ \$96/hr.)	
<input type="checkbox"/>	Sp.Ntc.	Attorney - \$1,250.00 (per	
<input type="checkbox"/>	Pers.Serv.	Local Rule)	
<input type="checkbox"/>	Conf. Screen	Bond Fee - \$25.00 (ok)	
<input type="checkbox"/>	Letters	Petitioner states that the conservatee died	
<input type="checkbox"/>	Duties/Supp	intestate and survived by three children.	
<input type="checkbox"/>	Objections	However, after payment of the court-ordered	
<input type="checkbox"/>	Video Receipt	fees and commissions, there will be no assets	
<input type="checkbox"/>	CI Report	remaining for distribution. Any remaining	
<input type="checkbox"/>	2620(c) n/a	property on hand will be distributed to the State	
<input checked="" type="checkbox"/>	Order	of California, Department of Health Services, to	
<input type="checkbox"/>	Aff. Posting	reimburse for Medi-Cal.	
<input type="checkbox"/>	Status Rpt	Petitioner prays for an Order:	
<input type="checkbox"/>	UCCJEA	1. Approving, allowing and settling the	
<input type="checkbox"/>	Citation	second and final account;	
<input type="checkbox"/>	FTB Notice	2. Authorizing the conservator and	
		attorney fees and commissions;	
		3. Authorizing payment of the bond fee;	
		and	
		4. Authorizing distribution of the balance of	
		property on hand to the State of	
		California.	
			Reviewed by: JF
			Reviewed on: 01/24/13
			Updates:
			Recommendation:
			File 9 - Hudson

(1) Waiver of Accounting and (2) Petition for Final Distribution and for (3) Allowance of Fees to Attorney (Prob. C. 11640, 10810)

DOD: 08/14/11		<p>DAVID MICHAEL VALLA, Administrator, is Petitioner.</p> <p>Accounting is waived.</p> <p>I & A - \$190,000.00 POH - \$190,000.00 (real property)</p> <p>Administrator - waived</p> <p>Attorney - \$4,500.00 (less than statutory, to be paid by Petitioner outside of the estate)</p> <p>Distribution, pursuant to intestate succession, is to:</p> <p>David Michael Valla - real property valued at \$190,000.00</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/o
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			04/17/12
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
			Reviewed by: JF	
			Reviewed on: 01/24/13	
			Updates:	
			Recommendation: SUBMITTED	
			File 10 - Valla	

Petition for Order Confirming Successor Trustee [Prob. C. 17200]

Goldie DOD: 04/20/98	DORETA RUTH WHITTEN , successor Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:	
Arthur DOD: 03/25/11			
Cont. from 112812	<p>Petitioner states:</p> <ol style="list-style-type: none"> The ARTHUR WILLIAM MYERS AND GOLDIE MAE MYERS JOINT REVOCABLE LIVING TRUST (the "Trust") was established under the laws of the State of Oregon on 09/14/95 with Arthur Myers & Goldie Myers as Trustors. When the Trust was established, Trustors owned units of Franklin California Tax-Free Income Fund, Inc. – Class I ("Franklin Fund") where were listed on Schedule A as an asset of the Trust. The Franklin Fund was serviced through an account at World Savings Bank. During the course of administration, units of Franklin California Income Fund – Class A were added to the account. The account changed hands during the bank and brokerage mergers and currently both Franklin California Income Funds are held in an account with Chase Investment Services Corporation titled, "Arthur W. Myers, Trustee of the Arthur W. Myers and Goldie May Myers Bypass Trust." Arthur Myers served as initial trustee and the Trustors' daughter, Petitioner Doreta Whitten, was designated to serve as successor trustee. Pursuant to section 1.7 of Article 1 of the Trust, either Trustor, acting alone, had the right to "exercise the rights of revocation, withdrawal, alteration, and amendment..." the Trust when either Trustor died or became incapacitated. After the Trustors moved from Oregon to California, the Trust was restated by a California Attorney on 10/08/97 (the "Restated Trust"). Arthur Myers remained as the initial Trustee and Petitioner remained as successor Trustee. On 04/20/98, Trustor Goldie Myers died and Arthur Myers continued to serve as Trustee. 	<p>CONTINUED FROM 11/28/12 Minute Order from 11/28/12 states: Counsel advises the Court that last night one of the intestate heirs contacted Attorney Joanne Sanoian. Counsel further advises that she believes there may be an objection. Counsel requests a continuance.</p> <p>As of 01/23/13, nothing further has been filed.</p>	
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail			w/
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

Continued on Page 2

6. After the death of Goldie Myers, Arthur Myers partially funded the sub-trusts created under the Restated Trust by transferring title on the Chase Investment Services Corporation ("Chase") account to Arthur W. Myers, Trustee of the Arthur W. Myers and Goldie May (sic) Myers Bypass Trust. This account is currently active. Petitioner states that the original Restated Trust was provided to Chase for copying at the time the account was transferred to the sub-trust.
7. Arthur Myers died on 03/25/11. After his death, Petitioner began serving as the sole successor trustee of the Trust and all sub-trusts established thereunder, including the Bypass Trust.
8. As part of her administration of the Trust, Petitioner submitted an Account Registration Change Request to Chase to request that her name be put on the account as successor Trustee. Chase rejected this request on the grounds that since the original Trust document did not use the term "Bypass Trust", the change would violate their internal policy without re-submission of the Restated Trust. (Chase is apparently unable to locate the copy of the Restated Trust provided to them by Mr. Myers).
9. After Mr. Myers death, Petitioner discovered that a portion of the original Restated Trust was missing from Mr. Myer's binder of original documents. After a diligent search, Petitioner has been unable to find the missing pages and has been unable to find a complete copy. The attorney who drafted the Restated Trust, Robert Zehner, has retired and the attorney who took over his filed, Ann Herring, has been unable to locate a copy due to a crash of the firm's computerized storage system. Ms. Herring has confirmed, however, that the appointment of Doreta Ruth Whitten as successor trustee was in effect at the Trustor's death. Without submission of the complete original Restated Trust, Chase will not put Petitioner on the account as successor trustee. Chase advised Petitioner that a court order would be required.

Petitioner prays for an Order:

1. Determining that Doreta Ruth Whitten is the Successor Trustee of the Arthur William Myers and Goldie Mae Myers Joint Revocable Living Trust and all sub-trusts established thereunder, including, without limitation, the Arthur W. Myers and Goldie Mae Myers Bypass Trust; and
2. Determining that Chase Investment Services Corporation account number xxx-x9207 (formerly account number xxx-xx4471) currently held in the name of Arthur W. Myers, Trustee of the Arthur W. Myers and Goldie May Myers Bypass Trust be transferred to Doreta Ruth Whitten, Successor Trustee of the Arthur W. Myers and Goldie Mae Myers Bypass Trust.

Atty Westcott, Marie (pro per – non-relative/Guardian)

Atty Vasquez, Natasha (pro per – mother/Petitioner)

Petition for Termination of Guardianship

Sable, 11		<p>NATASHA VASQUEZ, mother, is Petitioner.</p> <p>MARIE WESCOTT, non-relative, was appointed Guardian on 12/14/10. – <i>Served by mail on 12/08/12</i></p> <p>Father: KEITH CARTER</p> <p>Paternal grandfather: CHRISTOPHER CARTER Paternal grandmother: TAMERA COLLINSWORTH - <i>deceased</i></p> <p>Maternal grandfather: JOSEPH VASQUEZ Maternal grandmother: SHELLY FULLERTON – <i>Served by mail on 12/08/12</i></p> <p>Sibling: DRACOS BECKER (12)</p> <p>Petitioner alleges that her requests to be involved with the children's schooling, therapy, doctor's visits, and regarding visitation have been ignored. She states that she going to school to be an RN, has her oldest son in her care and is able to provide for the children. She therefore requests that the guardianship be terminated.</p> <p>Court Investigator Dina Calvillo filed a report on 01/22/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service by mail of <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i> at least 15 days before the hearing on:</p> <ul style="list-style-type: none"> - Keith Carter (father) - Christopher Carter (paternal grandfather) - Joseph Vasquez (maternal grandfather) - Dracos Becker (brother) 	
Killian, 7				
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/
	Aff.Pub.			
	Sp.Ntc.			
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	Letters			
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	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		<p>Reviewed by: JF</p> <p>Reviewed on: 01/24/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12 - Carter</p>		