



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.

Probate Status Hearing Re: (1) Failure to File Inventory & Appraisal; (2) Failure to File a First Account or Petition for Final Distribution [Prob. C. 12200, et seq.]

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
Cont. from		
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Notice of Hrg		
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Video Receipt		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>OFF CALENDAR Accounting and Petition for Final Distribution filed 02/04/13 and set for hearing on 03/12/13</p>
		Reviewed by: JF
		Reviewed on: 02/11/13
		Updates:
		Recommendation:
		File 1 - Walker

DOD: 09/03/09	<p>TERESA GOODING, daughter, was appointed Administrator with Limited IAEA Authority and funds held in a blocked account on 02/02/11.</p> <p>Letters of Administration were issued on 02/03/11.</p> <p>Receipt and Acknowledgement of Order for the Deposit of Money into Blocked Account filed 03/01/11 states funds in the amount of \$73,995.14 were deposited with Umpqua Bank on 02/25/11.</p> <p>Corrected Final Inventory & Appraisal filed 12/07/12 - \$92,328.14</p> <p>Status Report filed 1-25-13 states an order was made on 12-4-12 passing certain property to the estate and other parties. There have been discussions regarding the other parties buying out the interest of the estate, but no agreement has been reached. It is estimated that administration will need to continue for 4-6 months to get the property sold.</p> <p>Minute Order from Status Hearing Re Filing of First Accounting of Petition for Final Distribution dated 01/28/13 set this matter for status and states: Mr. Rindlisbacher is to give notice to the other parties.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>As of 02/11/13, nothing further has been filed in this matter.</p>	
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Citation			
FTB Notice			
Reviewed by: JF			
Reviewed on: 02/11/13			
Updates:			
Recommendation:			
File 2 - Sanchez			

Petition to Compel Turnover of the Betty Ruth Cozby Trust Pursuant to Probate Code Section 16061.5 and for Damages and Attorney's Fees Pursuant to Probate Code Section 16061.9

		JANICE POTTER is Petitioner.	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Continued from 1/4/13. As of 2/11/13 the following issue remains:</p> <p>1. Need Order.</p>
		Petitioner states she is an heir at law, and believes she is a beneficiary of the Betty Ruth Cozby Trust.	
		Betty Ruth Cozby died in April 2011.	
		Betty Cozby was unmarried and did not have children, and her parents and siblings predeceased her. Petitioner is a niece of Betty Cozby and heir at law under applicable Probate Code intestacy statutes.	
Cont. from 022912, 040412, 060412, 081312, 100412, 111512, 010413			
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		<p>Upon the death of Ruth Cozby the Trust became irrevocable. Petitioner states she requested orally, and then more formally, through counsel, a copy of the Trust. The formal request was made on 8/17/2011. No response has been received to the request.</p> <p>Probate Code §16061.5 provides that a trustee has a duty to provide a true and complete copy of the terms of an irrevocable trust, or irrevocable portion of a trust, to any beneficiary who requests it, and to any heir of a deceased settlor who requests it.</p> <p>Wherefore, Petitioner seeks relief as follows:</p> <ol style="list-style-type: none"> 1. For an Order compelling Edward D. Reimer to provide full and complete copies of the Betty Ruth Cozby trust, including any applicable schedules and amendments, if any; 2. For an Order compelling turnover of relevant information on the administration of assets of the Trust pursuant to Probate Code section 16061; 3. That Edward D. Reimer be ordered to personally pay Petitioner's attorney's fees and costs in filing and prosecuting this petition. <p>Statement of Assets Held in The Betty Cozby Living Trust filed by Edward D. Reimer and Ola May Langley on 6/4/12.</p>	
			Reviewed by: KT
			Reviewed on: 2/11/13
			Updates:
			Recommendation:
			File 3A - Cozby

Status Re: Accounting

		<p>JANICE POTTER filed a Petition to Compel Turnover of the Betty Ruth Cozby Trust and for Damages and Attorney's Fees. The matter was heard on 4/4/12 and continued to 6/4/12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 1/4/2013. Minute Order states Mr. Campbell appearing by Court Call. Mr. Gilmore advises the Court that Mr. Reimer has hired an accountant to prepare the accounting. He further advises that the inventory and appraisal of the jewelry has been completed.</p> <p>1. Need Accounting or current written status report pursuant to Local Rule 7.5.</p>
<p>Cont. from 081312, 100412, 111512, 010413</p>			
<input type="checkbox"/>	Aff.Sub.Wit.	<p>At the hearing on 6/4/12 the court set a status hearing for the filing of the accounting.</p>	
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<input type="checkbox"/>	UCCJEA	Reviewed by: KT	
<input type="checkbox"/>	Citation	Reviewed on: 2/11/13	
<input type="checkbox"/>	FTB Notice	Updates:	
		Recommendation:	
		File 3B – Cozby	

DOD: 08/01/12	<p>LARRY LUNA, surviving spouse, was appointed Administrator with Limited IAEA Authority and funds to be deposited into a blocked account on 01/30/13.</p> <p>Letters of Administration were issued on 01/30/13.</p> <p>Minute Order from 01/28/13 set this matter for Status Re Filing of Receipts.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Receipt and Acknowledgement of Order For the Deposit of Money Into Blocked Account (Form MC-356).</p> <p>Note: It does not appear that an Order to Deposit Money into Blocked Account (form MC-355) has been submitted by Petition or signed by the Court</p>
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		Reviewed by: JF
		Reviewed on: 02/11/13
		Updates:
		Recommendation:
		File 4 - Luna

DOD: 2/25/2012		<p>DARLA JEAN COWAN, granddaughter, and MAKENZIE MARIE COWAN, great-granddaughter, are petitioners.</p> <p>40 days since DOD.</p> <p>No other proceedings.</p> <p>Will dated: 6/20/1998 – devises 51% of the estate to Darla Jean Cowan and 49% of the estate to Makenzie Marie Cowan.</p> <p>I & A - \$45,000.00</p> <p>Petitioners request court determination that Decedent's 100% interest in real property located at 4321 E. McKenzie Avenue in Fresno pass to them prusuatn to decedent's Will, 51% to Darla Jean Cowan and 49% to Makenzie Marie Cowan.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Proof of service of the Notice of Hearing on:</p> <p> a. Scott Aaron Cowan (named executor)</p> <p> b. Donnie Adams (grandson)</p> <p>Indicates it was served on 2/6/13, 9 days-notice and not the required 15-day notice.</p>
Cont. from 013113			
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		<p>Reviewed by: KT</p> <p>Reviewed on: 1/29/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 - Knight</p>	

Age: 46	<p>ZERAH "JOY" BODRAK, mother, was appointed Conservator of the person on 09/13/84.</p> <p>Notice of Status Hearing filed 12/19/12 set this matter for hearing on 02/15/13. Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Zerah Bodrak and Christopher Bodrak on 12/19/12.</p> <p>Court Investigator Jennifer Daniel filed a report on 01/23/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
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	Reviewed by: JF	
	Reviewed on: 02/11/13	
	Updates:	
	Recommendation:	
	File 6 - Bodrak	

Status Hearing Re: Property and all Outstanding Matters

DOD: 7/2/2010	<p>DAVID D. GRABER, Son and Executor with Full IAEA with bond of \$564,000.00, petitioned the court to purchase the estate's real property for \$275,000.00.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from 083112, 101912	<p>On 6/28/12 the court confirmed the sale and set this status hearing regarding the property.</p>	<p>Continued from 10/19/12. Minute order states Counsel advises the Court that his client has been approved for a loan.</p>
Aff.Sub.Wit.	<p>Status Report of Attorney Richard Hemb filed on 10/16/12 states the remaining administrative activities involve the disposition of real property. Decedent's real property in Madera County was appraised at \$80,000.00. The asking price was \$60,000.00 but received no interest. Proceeding with the closing of the estate and requesting a court order conveying titled to each residual beneficiary may not be possible because it is not a position favored by <u>all</u> beneficiaries. The real estate broker has noted movement in this area at a level of \$25,000.00. The personal representative has now instructed the agent to market the property at that level.</p>	<p>1. Need current written status report pursuant to Local Rule 7.5.</p>
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FTB Notice		

Status Hearing Re: Settlement Agreement

Ernest DOD: 2003	<p>DENNIS L. THOMAS, son, beneficiary, and Successor Co-Trustee, filed a Petition to Determine Validity of Trust Instruments; to Determine Title to Property; to Recover Trust Property; to Compel Trustee to Account and Report; Financial Elder Abuse on 12-19-11 that was set for hearing on 2-7-12.</p> <p>JANETTE COURTNEY, Executor of the Estate of Loretta Drummond and Trustee of the Loretta M. Drummond "S" Trust filed a Response and Request for Abatement per Probate Code §854 on 1-30-12.</p> <p>Settlement Conference Minute Order 10-17-12 states: The Court notes for the record that a conference call was conducted in chambers with Charles Ashdon and Janette while both counsel were present. Parties reach a settlement agreement as fully set forth on the record by Mr. Keeler. Mr. Keeler indicates for the record that this is intended to be a settlement of both cases. Settlement agreement to be reduced to writing within the next four to five days. The Court will retain jurisdiction to enforce the agreement. Matter set for Status Hearing regarding the settlement agreement on 12/14/12. If the agreement is completed by 12/14/12, no appearance will be necessary. Set for 12/14/12 for: Status Hearing Re: Settlement Agreement</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 12-14-12: Mr. Keeler is appearing via conference call. Mr. Ivy informs the Court that the first half of the settlement agreement has been completed and the drafts have been circulated. Matter continued to 2/15/13. Parties agree that the documents may be submitted to the Court ex parte. Continued to 2-15-13.</u></p> <p><u>As of 2-12-13, nothing further has been filed.</u></p> <p>1. Need settlement agreement per minute order 10-17-12.</p>
Loretta DOD: 6/9/11		
Cont. from 121412		
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FTB Notice		
Reviewed by: skc		
Reviewed on: 2-12-13		
Updates:		
Recommendation:		
File 8 - Drummond		

Probate Status Hearing Re: Filing of the First and Final Account

		<p>MYRNA M. BOWMAN was appointed as conservator of the person and estate without bond on 9/28/11.</p> <p>Letters issued on 10/7/11.</p> <p>Inventory and appraisal filed on 11/9/12 shows the estate valued at \$253,939.39</p> <p>Notice of Status Hearing was mailed to attorney Gary L. Winter on 11/16/12.</p> <p>Status Report filed 1/10/13 states the conservatee died on 7/3/12. Petitioner states she intends to file her First Account and Second and Final Account by January 31, 2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first and final account or current written status report pursuant to Local Rule 7.5.</p>
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Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 2/11/13	
		Updates:	
		Recommendation:	
		File 9B - Robbins	

Age: 28	<p>LORILLA FONDA LEHMAN, great-aunt, was appointed Conservator of the person on 05/24/12 and Letters were issued on 05/24/12.</p> <p>Notice of Status Hearing filed 12/20/12 set this matter for status. Clerk’s Certificate of Mailing states that the Notice of Status Hearing was mailed to the Conservator and Conservatee on 12/20/12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note to Judge re Background: The conservatee is developmentally disabled and functions at about a 2-3 year old level. She has lived with Petitioner for several years without the need for conservatorship. Upon discovering that Christina was pregnant, the Ms. Lehman petitioned to be appointed as Conservator because Christina lacked capacity to give medical consent.</p>
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UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 02/12/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 - Morrow</p>

DOD: 3/17/2012		<p>JOSHUA HOUSSIERE and CARA HOUSSIERE were appointed co-Executors with full IAEA and without bond on 9/11/2012.</p> <p>Letters issued on 9/11/12.</p> <p>Inventory and Appraisal was due on 1/11/13.</p> <p>Status Report filed on 2/7/2013 states the Executors are not aware of any assets owned by the decedent in California. The Executor are aware of assets in Louisiana consisting of mineral rights. The state of Louisiana does not have any summary proceedings for distributing such mineral rights. Therefore, the Executors initiated probate this probate proceeding, so that an ancillary proceeding could be initiated in Louisiana for purposes of transferring the mineral rights owned.</p> <p>Executors are unable to proceed with the California probate until such time as the Louisiana probate is completed. The Executors do not yet have a time frame for the completion of the Louisiana probate.</p>	NEEDS/PROBLEMS/COMMENTS:	
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				Reviewed by: KT
				Reviewed on: 2/11/13
				Updates:
		Recommendation:		
		File 12 - Houssiere		

Status Hearing Re: Filing of the Inventory and Appraisal

Age:		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Inventory and appraisal filed on 10/15/12.
DOD:		
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Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 2/11/13
		Updates:
		Recommendation:
		File 13 - Dockstader

Atty Pape, Jeffrey B., of Pape & Shewan (for Executor Kelli Pereira)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 5/21/2012		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;">OFF CALENDAR</p> <p style="text-align: center;"><i>Final Inventory and Appraisal</i> was filed 10/12/2012.</p>
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		Reviewed by: LEG
		Reviewed on: 2/11/13
		Updates:
		Recommendation:
		File 14 - Fischer

Atty Moore, Susan L., of Pascuzzi, Moore & Stoker (for Co-Executors David Spencer and Suzanne Spencer MacInnis)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 7/23/2012		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR <i>Final Inventory and Appraisal was filed 10/15/2012.</i>
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FTB Notice		
		Reviewed by: LEG
		Reviewed on: 2/11/13
		Updates:
		Recommendation:
		File 15 – Spencer

Atty Coleman, William H., of Coleman & Horowitz (for Executor Theresa Johnson)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 6/6/2012		<p>THERESA JOHNSON, sister-in-law, was appointed Executor with Full IAEA without bond on 9/13/2012.</p> <p>Letters issued on 9/13/2012.</p> <p>Pursuant to Probate Code § 8800(b), <i>Final Inventory and Appraisal</i> was due 1/13/2013.</p> <p>Minute Order dated 9/12/2012 from the hearing on the petition for probate set the matter for a status hearing for filing of the inventory and appraisal on 2/15/2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need <i>Final Inventory and Appraisal</i> pursuant to Probate Code § 8800(b), or verified status report and proof of service of notice of the status hearing pursuant to Local Rule 7.5(B).</p>	
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<p>Reviewed by: LEG</p> <p>Reviewed on: 2/11/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 - Johnson</p>				

Atty Esraelian, Robyn L., of Richardson, Jones & Esraelian (for Executor Maria G. Resendes)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 4/10/2012		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR <i>Final Inventory and Appraisal filed 12/26/2012.</i>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
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		Reviewed by: LEG
		Reviewed on: 2/11/13
		Updates:
		Recommendation:
		File 17 - Fields

Atty Amador, Catherine A., of Pascuzzi, Moore & Stoker (for Co-Conservators Manuel Chavez and Susan Chavez-Leon)

Status Hearing Re: Filing of the Inventory and Appraisal

Age: 39 years	<p>MANUEL CHAVEZ, father, and SUSAN CHAVEZ-LEON, sister, were appointed Co-Conservators of the Person and Estate on 10/26/2012 with bond set at \$201,850.00.</p> <p>Letters issued on 12/19/2012; delay in issuance of letters appears to be due to Co-Conservators obtaining bond, which was filed on 12/3/2012 (for partial \$183,500.00), and 12/19/2012 (for total \$201,850.00.)</p> <p>Pursuant to Probate Code § 2610(a), <i>Final Inventory and Appraisal</i> was due on 1/26/2013.</p> <p>Minute Order dated 10/18/2012 from the hearing on the petition for appointment set the matter for status hearing on 2/15/2013 for filing of the inventory and appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need <i>Final Inventory and Appraisal</i> pursuant to Probate Code § 2610.</p>	
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			X
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: LEG	
		Reviewed on: 2/11/13	
		Updates:	
		Recommendation:	
		File 18 - Chavez	

Petition for Visitation

Age: 8	JEANINE BAKER, Mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 2-4-13. Minute Order 2-4-13: The Court directs the parties to participate in mediation today at 10:00 am.
	DOUGLAS and ELIDA BAKER, Maternal Grandparents, were appointed Guardians on 7-14-05.	
Cont. from 020413		
Aff.Sub.Wit.		
✓ Verified	Father: STEWART HAMBY Paternal Grandfather: Stewart Hamby, Sr. Paternal Grandmother: Cindy Bruer	
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg	Petitioner states she would like to ask the courts for more visitations with Trenton like weekends and holidays. Petitioner is also concerned about her parents picking the visitation days still and that he's not attending counseling.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.	Minute Order 9-25-12 (Current visitation): The Court waives notice to father for purposes of this hearing. The Court is advised that the child is no longer seeing Ms. Heppner. Visitation between mother and the child is ordered as follows: visitation shall be every Friday after school until Saturday at 7:00 p.m., and no later. Guardians are order to deliver the child to mother's residence after school or after any activity the child is participating in on that day. Child to be pick-up by the guardians after visitation. Guardians are to ensure that any medication the child is taking is delivered to mother who will then be responsible for seeing that said medication is taken. The Court orders Douglas Baker, Elida Baker, Jeanine Baker, and the child to participate in group or individual counseling through Comprehensive Youth Services as may be deemed appropriate. The Court further orders that the guardian, Douglas Baker contact Comprehensive Youth Services regarding counseling. Parties are ordered not to speak ill of one another around the child.	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 2-13-13
		Updates:
		Recommendation:
		File 19 - Hamby

Atty **Rusca, Christopher M (for Objector/father Marcos Galvan**

Atty **Harris, Richard A. (for Petitioners Kenneth Roberts and Youngae Roberts)**

Status

Saede age: 8	<p>KENNETH ROBERTS and YOUNGAE ROBERTS, maternal grandparents were appointed temporary guardians.</p> <p>Father (Saede): MARCOS GALVAN – Objects to the guardianship.</p> <p>Father (Jaeden): OSRIS PULIDO – consents and waives notice.</p> <p>Mother: SARAH ROBERTS – deceased.</p> <p>Background: The minor's mother was murdered on 1/1/2012. At the time of her death mom had full custody of both her children.</p> <p>Petitioners allege that they took custody of the children upon the death of their mother. On January 2, 2012 Saede's father, Marcos Galvan demanded they turn Saede over to him. Petitioner state they refused and Mr. Galvan returned the next day with the Sherriff and Petitioners were forced to relinquish custody.</p> <p>Petitioners filed a Petition to be Appointed Guardian on 1/5/12. On 1/6/12 the court granted temporary guardians of the two children to Petitioners/maternal grandparents, Kenneth Roberts and Youngae Roberts.</p> <p>Jaeden's father, Osrís Pulido, consented to the guardianship for his son, Jaeden.</p> <p>Saede's father, Marcos Galvan, objected to the appointment of a guardian for his daughter, Saede.</p> <p>The matter was set for a contested trial.</p> <p>Minute Order from the Settlement Conference on 1/28/13 states the Court Trial for 2/15/13 is taken off calendar and this status hearing was set.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>This matter is set to be heard at 10:00 a.m.</p> <p>1. Need current written status report pursuant to Local Rule 7.5.</p>
Jaeden age: 4		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: KT

Reviewed on: 2/13/13

Updates:

Recommendation:

File 1 – Galvan & Roberts