



## 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.]

<b>DOD: 12/21/2005</b>	<b>KAMLJIT K. ASHAT</b> , surviving spouse, was appointed as Administrator with full IAEA authority and without bond on 2/10/2009.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Inventory and Appraisal, first account, petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matter set for Status Hearing (unless inventory and appraisal <u>and</u> accounting or petition for final distribution has been filed) <b>verified Status Reports must be filed no later than ten (10) days before the hearing</b> and shall be served on all interested parties.	
<b>Cont. from</b>	At the time of the filing of the Petition for Probate the estate was estimated to be \$2,761,000.00.		
<b>Aff.Sub.Wit.</b>	The decedent died intestate survived by his spouse and three children, one of which is a minor.		
<b>Verified</b>	Inventory and appraisal was due July 2009.		
<b>Inventory</b>	First account or a petition for final distribution was due April of 2010.		
<b>PTC</b>	Notice of Status Hearing was mailed to attorney William Cowin on 12/19/2012.		
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 2/20/13</b>
			<b>Updates:</b>
		<b>Recommendation:</b>	
		<b>File 1 - Ashat</b>	

Probate Status Hearing Re Failure to File a First Account or Petition for Final Distribution (Prob. C. 12200)

<b>DOD: 3/11/2010</b>		<p><b>OWEN R. OVERTON</b> was appointed Administrator without bond on 5/25/10 and Letters issued.</p> <p>I &amp; A was filed on 12/22/11 showing the estate valued at \$510,000.00</p> <p>First Account or Petition for Final Distribution was due June 2011.</p> <p><b>Status Report filed on 2/14/13</b> states the estate has been delayed because of the difficulty of selling the apartment building which constitutes the primary asset of the estate. The market for small apartment buildings is still very challenging and there have been very few sales in the Clovis area. Administrator states they have dropped the listing price to \$575,000.00. They are currently negotiating what appears to be an all-cash offer of \$500,000.00. If this sale does not materialize, they will be dropping the listing price to \$550,000.00.</p> <p>It will be necessary to sell the real property because there are multiple beneficiaries and they will not consent to joint ownership of the property.</p> <p>All creditor's claims who have filed claims against the estate have been paid.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need proof of service of the <i>Notice of Hearing</i> along with a copy of the <i>Status Report</i> on:             <ol style="list-style-type: none"> <li>a. Wells Fargo Card Services (pursuant to their <i>Request for Special Notice</i> filed on 5/7/10)</li> </ol> </li> </ol>
<b>Cont. from 041912, 101812</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W/		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
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<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 12/20/13</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 2 - Overton</b></p>	



**Trial Minutes 9-20-11 indicates the parties reached agreement, stated fully on the record, trial date is vacated, matter continued to 11-8-11 for settled case status hearing.**

*Note: Per Status Report filed 11-4-11 by Attorney Janet Wright, the parties agreed to and read an extensive and detailed settlement agreement into the record on 9-21-11. It was later requested that Ms. Wright prepare and circulate a written agreement. Transcript attached. Supplemental Status Report filed 11-7-11 provides an unsigned copy of the agreement and requests continuance.*

**Per Minute Order 11-8-11, Status Conference was set on 12-5-11, temp extended to 12-5-11. The Court indicates for the record that the Public Guardian is to remain as temp conservator until further order of the court or until the agreement is signed.**

**Minute Order 12-5-11 states MARLENE HUBBELL, under the advance health care directive and subject to a settlement agreement, will act as conservator of the person with medical powers and the Public Guardian will 'step back' but not have to come back to court to step back in. Since no objections are given, the Public Guardian will continue to act as conservator of the estate.**

**Public Guardian's First Account was settled on 1-23-13. Note: The account covers only an amount received from Mr. McClintic's spouse. No other assets have been inventoried or marshaled.**

**Minute Order 1-23-13:** Ms. Kruthers informs the Court that the only reason for the Public Guardian to remain at this point is because of the settlement agreement. Matter set for status Conference on 2-22-13. Ms. Sanoian is directed to provide notice to Ms. Brungess.

**Therefore, it appears that, pursuant to Minute Order 12-5-11, MARLENE HUBBELL is to serve as Conservator of the Person, subject to a settlement agreement that has not yet been finalized, and the PUBLIC GUARDIAN is to serve as Conservator of the Estate; however, no final Settlement Agreement has been filed, and no permanent Letters of Conservatorship of either the Person or Estate have issued.**

**Note: If permanent conservatorship is established, the Court may wish to set status hearing for the filing of an Inventory and Appraisal and the next account.**

**Note: If Marlene Hubbell is appointed as Conservator of the Person, the Court may require documentation originally required at petition, since Ms. Hubbell did not originally petition, such as the Confidential Conservator Screening Form, the Video Receipt, and the Duties of Conservator form, in order for Letters to issue.**

**Note: If there are any issues involving the trust, such issues must be addressed separately under appropriate code in a separate case.**

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution (Prob. C. 12200 et seq)

Age: 80 years	<p><b>KATINA SAPIEN LOZANO PAULEY</b> was appointed as conservator of the person and estate with bond of \$60,000.00 on 10/28/11.</p> <p>Letters issued on 10/28/11.</p> <p>Inventory and appraisal was filed on 2/8/12 showing the estate valued at \$37,268.63</p> <p>Notice of Status Hearing filed on 10/31/12 was mailed to the attorney, Joanne Sanoian on 10/31/2011.</p> <p><b>Status Report filed on 12/11/12</b> states a draft of the first account is nearly completed and should be filed with this court within 45 days. <b>A continuance of 45 days is requested.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Continued from 12/13/12.</p> <p>1. Need first account or current written status report pursuant to Local Rule 7.5 which states in all matter set for Status Hearing (unless accounting has been filed) <b>verified Status Reports must be filed no later than ten (10) days before the hearing</b> and shall be served on all interested parties.</p>
Cont. from 121312		
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: 2/20/13		
Updates:		
Recommendation:		
File 4 - Lozano		

**5 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**

<b>Age:</b> 51	<b>CARL HAWK</b> , husband, was appointed Conservator of the Person and Estate on 10/27/11.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <ol style="list-style-type: none"> <li>1. <b>Need Inventory &amp; Appraisal.</b></li> <li>2. <b>Need First Account and Report of Conservator.</b></li> </ol>
	<b>Letters of Conservatorship</b> were issued on 10/28/11.	
<b>Cont. from</b>	<b>Inventory &amp; Appraisal was due in March 2012.</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	<b>The First Account was due in October 2012.</b>	
<input type="checkbox"/> <b>Verified</b>	<b>Status Hearing Report filed 02/19/13 states:</b> The conservatee's and conservator's assets are held as community property, over which the conservator has management and control. Conservatorship of the estate was established to receive a profit sharing distribution arising from the conservatee's previous employment at Simonian Packing Company. Before conservatorship of the estate was established, it was the conservator's understanding that the conservatee would be receiving a distribution. However, at this time, such distribution has not yet occurred. Currently, the Department of Labor is investigating Simonian Packing Company's problems with pensions and profit sharing plan. On 01/15/13, Department of Labor investigator Eric Tristan stated that he did not have an updated status on the investigation, but that an update will be made in 90 days. He stated that this is an extensive investigation involving a lot of parties. An Inventory & Appraisal has not been filed because the conservator has not taken possession of any assets. Until the Department of Labor's investigation is completed, the conservatee will not receive any distributions. A continuance of 90 days is requested, by which time the conservator will have an update from the Department of Labor.	
<input type="checkbox"/> <b>Inventory</b> <input checked="" type="checkbox"/>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF <b>Reviewed on:</b> 02/20/13 <b>Updates:</b> <b>Recommendation:</b> <b>File 5 - Hawk</b>

**Status Hearing Re: Filing of the Inventory and Appraisal**

<b>Age:</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>OFF CALENDAR</b> <b>Inventory &amp; Appraisal filed</b> <b>10/22/12</b>
<b>DOD:</b>		
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
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<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 02/20/13
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 6 - Flores</b>

**Status Hearing Re: Filing of the Inventory and Appraisal**

<b>DOD: 08/05/12</b>	<p><b>RAY HARIKIAN</b>, nephew, was appointed Executor without bond on 09/25/12. Letters Testamentary were issued on 09/25/12.</p> <p><b>Inventory &amp; Appraisal, Partial No. 1</b> was filed 12/11/12 - \$149,659.00.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>1. Need Final Inventory &amp; Appraisal.</b>
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 02/20/13
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 7 – Harikian</b>

**Status Hearing Re: Filing of the Inventory and Appraisal**

<b>DOD: 06/22/12</b>	<b>KAREN K. WILLIAMS</b> , daughter, was appointed Administrator with bond fixed at \$170,000.00 on 09/24/12.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>1. Need Inventory &amp; Appraisal.</b></p> <p><b>Note to Judge:</b> Letters have not issued. There is a status hearing set for 03/08/13 re: Proof of Blocked Account and Filing of an Amended Petition for Limited Powers.</p>
<b>Cont. from</b>	<p><b>Minute Order from 10/26/12 states:</b> Counsel advises the Court that the personal representative has been declined bond. The Court continues the matter to 11/16/12. Counsel is directed to file an amended petition with limited powers and a blocked account.</p> <p><b>Minute Order from 11/16/12 states:</b> No appearances. Matter continued to 12/07/12. If the bond is not filed by 12/07/12, Richard Hemb is ordered to be personally present on that date.</p> <p><b>Minute Order from 12/07/12 states:</b> Mr. Hemb informs the court that he has lost contact with his client Ms. Williams. Order to show cause is ordered for Ms. Williams. Ms. Williams is ordered to personally appear at the next hearing on 01/18/13. Mr. Hemb may file a withdrawal of attorney and it can be heard on 01/18/13.</p> <p><b>Minute Order from 01/18/13 states:</b> Karen Williams informs the Court that the funds have not been placed in a blocked account and provided the court with contact information. <b>The matter was continued to 03/08/13 for filing of Proof of Blocked Account and Filing of Amended Petition Re: Limited Powers</b></p>	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>	x	
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 02/20/13
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 8 – Williams</b>



Probate Status Hearing Re: Filing of the First Account or Petition for Final Distribution

<b>DOD: 09/26/08</b>	<p><b>CHRIS JOHNSON</b>, son, was appointed Executor and Letters were issued on 10/21/10.</p> <p><b>Minute Order from hearing on 10/21/10</b> set this matter for status for filing the First Account or Petition for Final Distribution on 12/15/11.</p> <p><b>An Inventory &amp; Appraisal was filed 01/26/11.</b></p> <p><b>Clerk's Certificate of Mailing filed 05/29/12</b> states that Chris Johnson was mailed a copy of the 05/24/12 minute order and Order to Show Cause on 05/29/12.</p> <p><b>Clerk's Certificate of Mailing filed 07/27/12</b> states that Chris Johnson was mailed a copy of the 07/12/12 minute order and Order to Show Cause on 07/27/12.</p> <p><b>Minute Order from hearings on Order to Show Cause and Status re Filing of the Account on 08/09/12</b> state: Mr. Johnson informs the court that he is in the process of preparing the accounting <b>and continued the status hearing to 10/05/12.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>CONTINUED FROM 01/11/13</b>  <b>Minute order from 01/11/12 states:</b>  <b>Mr. Johnson is directed to check with the Clerk's office regarding any fees owed and make the necessary arrangements for payment.</b></p> <p>As of 02/20/13, the petitioner has not filed any new documents.</p> <p>1. Need First Account or Petition for Final Distribution.</p>
Cont. from 121511, 020912, 052412, 071212, 080912, 100512, 111612, 011113		
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		
<p><b>Reviewed by:</b> JF</p>		
<p><b>Reviewed on:</b> 02/20/13</p>		
<p><b>Updates:</b></p>		
<p><b>Recommendation:</b></p>		
<p><b>File 12 – Johnson</b></p>		

<b>DOD: 04/27/12</b>	<p><b>JENNIFER R. MELTON</b>, daughter, was appointed Administrator with Will Annexed with in the amount of \$35,276.00 on 09/25/12.</p> <p>Bond was filed 11/13/12.</p> <p>Letters of Administration were issued on 11/13/12.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>OFF CALENDAR</b>  <b>Inventory &amp; Appraisal filed</b>  <b>02/20/13</b></p>
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 02/20/13</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 14 - Melton</b></p>	

Status Hearing Re: Filing of Receipt for Blocked Account

Age: 17	SONAE MARSHALL, sister, was appointed Guardian of the Estate on 01/09/13.	NEEDS/PROBLEMS/COMMENTS:
	The Petition stated that the minor was to receive life insurance proceeds in the amount of \$102,000.00.	1. Need Receipt and Acknowledgement of Order for the Deposit of Money into Blocked Account.
Cont. from	Order to Deposit Money into Blocked Account was filed 01/09/13.	
Aff.Sub.Wit.		
Verified	Letters were issued on 01/16/13.	
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: JF
		Reviewed on: 02/20/13
		Updates:
		Recommendation:
		File 15 - Marshall

**16A Betty Ruth Cozby Revocable (Trust)**

**Case No. 12CEPR00087**

**Atty Campbell, Robert N (for Petitioner Janice Potter)**

**Atty Gilmore, David M. (for Edward D. Reimer and Ola Mae Langley)**

**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**

		<b>JANICE POTTER</b> is Petitioner.	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b>Continued from 2/15/13. As of 2/20/13 the following issue remains:</b></p> <p>1. Need Order.</p>
		<b>Petitioner states</b> 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.	
<b>Cont. from 022912, 040412, 060412, 081312, 100412, 111512, 010413, 021513</b>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	W/	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>	X	
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
		<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><b>Wherefore, Petitioner seeks relief as follows:</b></p> <ol style="list-style-type: none"> <li>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;</li> <li>2. For an Order compelling turnover of relevant information on the administration of assets of the Trust pursuant to Probate Code section 16061;</li> <li>3. That Edward D. Reimer be ordered to personally pay Petitioner's attorney's fees and costs in filing and prosecuting this petition.</li> </ol> <p><b>Statement of Assets Held in The Betty Cozby Living Trust filed by Edward D. Reimer and Ola May Langley on 6/4/12.</b></p>	
			<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 2/20/13</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 16A - Cozby</b></p>

**Status Re: Accounting**

		<p><b>JANICE POTTER</b> 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>At the hearing on 6/4/12 the court set a status hearing for the filing of the accounting.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 2/15/2013. Minute Order states Mr. Gilmore advises the Court that the appraisal has been done but he accounting has not been filed. He further advises that he received a voicemail from Edward Reimer indicating that the accounting would be filed within the next day or two. The Court orders Edward Reimer to be personally present on 2/22/13. Mr. Gilmore is to have his client present at the next hearing.</b></p> <p>1. Need Accounting or current written status report pursuant to Local Rule 7.5 which states in all matter set for Status Hearing (unless accounting has been filed) <b>verified Status Reports must be filed no later than ten (10) days before the hearing</b> and shall be served on all interested parties.</p>
Cont. from 081312, 100412, 111512, 010413, 021513			
Aff.Sub.Wit.			
Verified			
Inventory			
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Notice of Hrg			
Aff.Mail			
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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: 2/20/13	
		Updates:	
		Recommendation:	
		File 16B – Cozby	