



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 and Final Account and Report of Administrator and Petition for Its Settlement, (2) for Allowance of Compensation to Administrator and Attorney for Ordinary Services and (3) for Final Distribution

Age: 3/30/2003		DARRELL DEAN MOBLEY , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Creditor's Claims filed by; Fancher Creek Packing, MBNA, Sears, Cade Ranch and Bank of America were rejected on 1/8/14. The claimants have 90 days in which to file an action on the rejected claim. Therefore it appears that the estate will not be in a condition to close until after April 8, 2014.
		Account period: 3/30/03 – 12-30-13	
Cont. from		Accounting - \$47,681.92	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$44,678.65	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$22,857.99	
<input checked="" type="checkbox"/>	Inventory	Administrator (statutory) - \$1,907.28	
<input checked="" type="checkbox"/>	PTC	Attorney (statutory) - \$1,907.28	
<input checked="" type="checkbox"/>	Not.Cred.	Closing - \$2,000.00	
<input checked="" type="checkbox"/>	Notice of Hrg	W/O	
<input checked="" type="checkbox"/>	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.	Distribution of property on hand in partial satisfaction of their creditor's claim is to:	
	Pers.Serv.		
	Conf. Screen	Franchise Tax Board - \$17,043.43	
<input checked="" type="checkbox"/>	Letters	6/17/03	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice	N/A	
			Reviewed by: KT
			Reviewed on: 3/5/14
			Updates:
			Recommendation:
			File 1 – Mobley

**Petition to Determine Title and Request Transfer of Personal Property to the Estate
and Assess Statutory Damages Thereto Against Mary J. Quin**

DOD: 3-31-10	JOSEPH W. MARTIN , Administrator with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Note: Related civil litigation 12CECG03130 Joseph W. Martin v. Mary J. Quin has upcoming hearing scheduled 4-3-14. See status report.
Cont. from 121813, 010614	Petitioner states he is an 86 year old man and is the duly appointed administrator of the estate. Petitioner is the decedent's spouse and intestate heir to the decedent's estate. The decedent is Petitioner's second wife and is unrelated to Mary Quin, Petitioner's daughter from his first wife.	Continued from 12-18-13, 1-6-14
<input type="checkbox"/> Aff.Sub.Wit.		Minute Order 1-6-14: The Court is advised that the matter has been resolved and they are in the process of preparing an agreement.
<input checked="" type="checkbox"/> Verified		Status Report filed 3-4-14 by Attorney McCloskey (not verified by Administrator) states: The parties agreed to mediation in the civil action and a Petition to Approve Compromise of Pending Action is now pending in that Court, set for hearing on 4-23-14 in Dept. 403. It is the Administrator's intention to request dismissal of this Petition to Determine Title once the settlement of the other case is approved by Judge Culver Kapetan. The Administrator currently resides at an assisted living facility and has mobility issues that make it difficult to attend the hearing and asks that he be excused from attending this hearing.
<input type="checkbox"/> Inventory	After decedent's death, Petitioner requested that his daughter Mary Quin, a licensed California attorney, assist with the transfer of PG&E stock issued in the decedent's name. Quin held herself out as a qualified probate attorney and Petitioner trusted her to provide competent legal services and counsel after the death of his wife. Unknown to Petitioner, Quin prepared a revocable living trust, will, durable powers of attorney and related documents for Petitioner. Quin brought these documents to Petitioner on 4-24-10 and required him to sign documents that eventually appointed Quin as trustee and gave herself control over Petitioner's life savings, without Petitioner's consent and knowledge and with the intent to defraud and eventually embezzle and convert his life savings, as well as the decedent's assets.	Note: This information is provided by the Examiner for status purposes only: A status hearing in this estate is scheduled for 5-30-14 for the filing of the petition for final distribution. However, Examiner notes that a Final Inventory and Appraisal has not yet been filed.
<input type="checkbox"/> PTC		Reviewed by: skc
<input type="checkbox"/> Not.Cred.		Reviewed on: 3-5-14
<input checked="" type="checkbox"/> Notice of Hrg		Updates:
<input checked="" type="checkbox"/> Aff.Mail		Recommendation:
<input type="checkbox"/> Aff.Pub.		File 3 – Martin
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.	Petitioner states Quin obtained a Schwab Attorney-in-Fact Agreement and Affidavit of Attorney-in-Fact for Non-Schwab Power of Attorney for Theresa Martin's and Petitioner's Charles Schwab accounts and then converted, embezzled, and stole both IRA accounts, using the POA, to take the decedent's Schwab IRA, which was to go to Petitioner and as successor trustee, to gain control over Petitioner's Schwab IRA.	
<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	Petitioner states Quin replaced Petitioner's mailing address on the Schwab accounts to her law office address, and changed the phone number to her law office number. She never informed him that she had taken control of the accounts and had statements forwarded.	
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
SEE ADDITIONAL PAGES		

Petitioner states that on 4-24-10, Quin required Petitioner to give Quin a blank check that the Decedent, Theresa Martin, had executed prior to date of death, drawn on an estate asset, the decedent's United Security Bank account. Quin required Petitioner to make the check payable to Quin's law offices. See Exhibit C. Quin advised Petitioner at the time that she would use this money in Decedent's bank account to obtain the PG&E stock for Petitioner that was held in the decedent's name.

Petitioner states Quin never attempted to obtain the PG&E stock, and, despite Quin's self-professed expertise in probate proceedings and estate planning, Quin never attempted to probate the estate.

Petitioner states Quin deposited the check in September 2010 to her law office account. Quin knew or should have known that decedent's checking account was an estate asset, and as such, her acceptance and negotiation of the check was illegal and improper, and that the estate, given the decedent also owned a single family residence, needed to be formally probated.

In January 2012, Petitioner contacted Charles Schwab by telephone to inquire about his life savings, the IRA accounts. Petitioner was informed that decedent's and his accounts had been depleted completely by Quin using the durable power of attorney.

At no time did Petitioner intentionally, knowingly or willingly gift and/or loan the assets that made up his life savings, the brokerage and IRA Rollover accounts at Charles Schwab to Quin.

In Feb. 2012, Petitioner first contacted his attorney, Babette Fischer, who made a demand on Quin to return the \$40,000, make an accounting, and return the money that she had embezzled and stole to the accounts. Fischer also terminated Quin's powers revoked in writing by Petitioner. See attached.

Petitioner filed a complaint with the California State Bar regarding Quin's conduct as an attorney, and has been informed that the State Bar is holding its investigation pending the outcome of civil litigation that Petitioner has initiated as well against Quin regarding her fraud and deceit.

Prior to her death, the decedent kept a separate property checking account at United Security Bank xxx049 that contained approx. \$40,000 prior to her death. On or about 9-1-10, Quin deposited the decedent's estate check from that account that Quin required Petitioner give her April 2010 into Quin's law office trust account. On 9-8-10, Quin converted that estate, asset to her own personal use.

Petitioner states Quin intentionally defrauded the Petitioner and the estate of that account and the Schwab accounts. Quin knew the estate should have been probated but that Quin could negotiate the blank check executed by the decedent prior to her death and then convert the money to her own use. Quin engaged the petitioner unwittingly in an illegal act, in presenting the check for negotiation after the decedent's death. Petitioner did not know that the law requires the account to be probated in some form under California law.

Petitioner states Quin took the estate account under the guise of assisting petitioner in acquiring the stock held by decedent.

SEE ADDITIONAL PAGES

Page 3

Petitioner and Quin have only seen each other sporadically in many years. The last time Quin and Petitioner met was on 4-24-10 when Quin defrauded Petitioner into executing a living trust naming Quin as trustee and allowing Quin to take his brokerage and IRA rollover accounts, and giving Quin the \$40,000 check. Quin, with malice and bad intent then concocted the gift and loan scheme to defraud her father of both his life savings as well as the decedent's.

Petitioner believes Quin's actions are malicious and outrageous requiring application of Probate Code §859.

Petitioner requests pursuant to Probate Code §850(a)(2)(D) that title to the above described money is vested in Petitioner as administrator of the estate. Petitioner further requests the Court find and hold Mary Quin as a constructive trustee of those funds and hold the proceeds of that account for the estate of Theresa Martin.

Petitioner further requests that the Court issue a citation pursuant to Probate Code §1240 for Mary J. Quin to appear and state why she cashed a \$40,000 check on Decedent's United Security Bank account more than five months after decedent's death and why she should not be required to reimburse decedent's estate.

Petitioner prays for an order as follows:

1. **Quin be ordered to pay Petitioner as Administrator of the Estate of Theresa Martin the net proceeds of the above-described property; and**
2. **Quin be declared a constructive trustee of the proceeds of the above-described property for the benefit of the Estate of Theresa Martin; and**
3. **A citation be issued to Mary J. Quin to appear and state why she cashed a \$40,000 check on decedent's United Security Bank account more than 30 days after decedent's death; and**
4. **A finding that Quin in bad faith has taken, concealed, or disposed of the property by the use of undue influence in bad faith and through the commission of elder or dependent adult financial abuse, as defined in Section 15610.30 of the W&I Code, the property of the Estate of Theresa Martin, to wit: United Security Bank checking account No. xxx049 in the amount of \$40,000; and**
5. **A finding and order that Mary Quin is liable for twice the value of the property recovered by this action pursuant to Probate Code §859; and**
6. **An order that Quin pay Petitioner's costs and attorney fees herein; and**
7. **Such other remedies available in law or equity that the Court would deem just and proper.**

Note: The proposed order does not appear to include the constructive trust or other findings. See proposed order.

Petitioner also filed Notice of Request for Court to Take Judicial Notice and Memorandum of Points and Authorities in Support Thereof, with reference to First Amended Complaint filed 2-5-13 in 12CECG03130.

Note: On 12-6-13, Respondent Mary J. Quin filed an ex parte request to continue the hearing from its originally scheduled date of 12-18-13. This Court's order filed 12-9-13 continued the matter to this date.

However, as of this date, it does not appear that any objection or response has yet been filed in this matter by Ms. Quin.

Stephan DOD: 08/09/05	DENNIS FREEMAN , successor trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Debbra DOD: 05/13/13	Petitioner states:	<u>CONTINUED FROM 01/28/14</u>
	1. Stephan F. Winter and Debbra L. Winter ("Settlor") executed the Stephan F. Winter and Debbra L. Winter Revocable Trust (the "Trust") on 02/16/94 in their capacity as Settlor and initial Trustees. The Trust was amended on 09/14/02.	1. Need Order.
Cont. from 081213, 102113, 112013, 120913, 010614, 012814	2. Petitioner is the currently acting successor trustee of the Trust.	
Aff.Sub.Wit.	3. This petition concerns the ownership of the original Trust documents which Christopher Lull ("Respondent") or his agents have taken possession of and refused to deliver to the trustee.	
✓ Verified	4. The Settlor's maintained the original trust documents in a binder. Shortly before her death, Debbra delivered the binder to real estate agent Michele Lane in connection with a real estate transaction. The real estate agent had possession of the binder when Debbra died and maintained possession of it, refusing to deliver it to anyone without a court order. Thereafter, Respondent's attorney, Sue Campbell, represented to Michele Lane that the family agreed that it was ok that Ms. Lane release the binder to Respondent in care of attorney Sue Campbell.	
Inventory	5. This was not acceptable to Petitioner because (1) Petitioner was the trustee and not respondent, and (2) Respondent, Debbra's son, had been intentionally omitted from the Trust due to a long standing estranged relationship.	
PTC	6. Petitioner has demanded the release of the trust binder from Respondent's former attorney, Sue Campbell; however, initially Sue Campbell's assistant professed no knowledge of a binder being picked up by her office and later Sue Campbell professed no knowledge of a binder being picked up from Michele Lane. Petitioner's demands that Respondent deliver the binder to Petitioner's attorney have been ignored.	
Not.Cred.	Petitioner prays for an Order:	
✓ Notice of Hrg	1. Declaring that Petitioner is the sole owner of the original trust documents and that Respondent has no interest in the original trust documents.	
✓ Aff.Mail w/	2. Directing Respondent to immediately deliver possession to Petitioner of any and all trust documents including but not limited to the original Trust, original Trust amendment, and the estate planning binder.	
Aff.Pub.	Continued on Page 2	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
✓ Objections		
Video Receipt		
CI Report		
9202		
Order x		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Objection filed 08/07/13 by Christopher Lull, Respondent, states:

1. Petitioner does not have standing to bring this Petition. Petitioner is not the trustee because the amendment naming him as trustee was revoked. Morgan Quail witnessed the destruction of the amendment (see *Declaration of Morgan Quail*). Without the amendment, Petitioner is not the trustee or a beneficiary of the Trust and has no vested interest in the Trust.
2. Petitioner is not a relative or heir of Debra L. Winter.
3. Michele Lane, the real estate agent described in the Petition, was in possession of the original estate planning binder at the time of Debra Winter's death. Ms. Lane turned over the binder to Respondent because she found his name in the estate documents, and could not locate Petitioner's name in the binder. Because Ms. Lane could not find Petitioner's name in the documents and didn't know who he was, she refused to turn the binder over to him. Respondent's attorney has spoken to Ms. Lane and anticipates that she will be a witness in this matter. Ms. Lane stated to Respondent's attorney that Petitioner admitted to her that he never even met Debra Winter. This information supports the fact that the amendment was destroyed and not in the original estate planning binder.
4. In the absence of the original, there is a legal presumption that the document was revoked. Additionally, pursuant to Probate Code § 6120(b), we have an act of destruction consistent with the intent to revoke. This presumption cannot be overcome based on the Declaration of Morgan Quail and the expected testimony of Michele Lane.
5. Respondent, Christopher Lull, is the successor trustee of the Trust dated 07/16/94 and the primary beneficiary. He had every right to withdraw the money from Bank of America, as Trustee.

Objector prays for an Order:

1. Denying the Petition to Determine Title to and Require Transfer of Property to Trust Regarding Bank Account; and
2. Denying the Petition to Determine Title to and Require Transfer of Property to Trust.

Declaration of Morgan Quail in Support of Objection filed 08/07/13 states:

1. He is Debra Winter's nephew and probably one of her closest family members. Debra felt like a bit of an outsider in their family and felt left out. Declarant always tried to include her in his life events and she always seemed grateful to be included.
2. Their family has a lot of drama. Declarant states that he has tried to stay out of it and remain neutral. He believes that this is why Debra confided in him and spoke to him about things she might not talk about with others.
3. Approximately 2 years ago on Father's Day, Debra pulled Declarant aside and asked to talk to him. During their conversation, she removed a document titled amendment to trust from her purse and proceeded to tear it up in front of him. She stated that she wanted to keep her money in the family. Declarant also believes she was having conversations with her sister Catherine and father Stanton about this issue as well.
4. At Christmastime later that year, Declarant received a card from Debra thanking him for the talk on Father's Day.

Joint Status Report filed 12/18/13 provides an outline/summary of the petitions filed in this matter.

First Amended Objection to Petition to Determine Title to and Require Transfer of Property to Trust filed 01/07/14 states:

1. Objector, Christopher Lull, is the son of Debra L. Winter, deceased, who is the co-settlor and the successor trustee of the STEPHAN F. WINTER and DEBRA L. WINTER REVOCABLE TRUST (the "Trust") dated 02/16/94.
2. Decedent, Debra Winter ("Debra") and her husband Stephan F. Winter ("Stephan") created the Trust dated 02/16/94 in which they were both named as settlors and co-trustees. A purported Amendment to the Trust was executed on 09/14/02.
3. Under the terms of the Amendment, the successor trustee, upon the death of the first of Stephan and Debra, was named as Dennis Freeman. Further, on the death of the surviving spouse/settlor, the estate was to be distributed to Dennis Freeman, if living, and if not, to Morgan Quail.

Continued on Page 3

4. The purported Amendment to the Trust was not a true and voluntary expression of testamentary intent of the co-settlor and co-trustee, Debra Winter, but was a result of the control, demands, and undue influence of Stephan F. Winter, Debra's spouse.
5. Stephan, taking advantage of the confidential and fiduciary relationship between him and his spouse, Debra, and by reason of the trust and confidence so reposed in Stephan by Debra, was able to and did influence and control the mind and actions of Debra and induce her to sign the purported Amendment to the trust which provided, among other things, that all of the assets of the Trust be distributed upon the death of the surviving spouse to Dennis Freeman, who is unrelated to Debra, and is a cousin of Stephan.
6. Prior to signing the Amendment, Stephan exhibited animosity and opposition to Objector, who is the only child and natural heir of Debra, and attempted to, and did, alienate Debra from Objector and induced her to sign the purported Amendment to the Trust excluding Objector as a beneficiary of the Trust, contrary to the terms of the initial Trust dated 02/16/94. As a result of the undue influence, pressure, and control by Stephan, and the alienation that he induced between Debra and Objector, the Amendment dated 09/14/02, was not the true intent and testamentary wish of Debra, but was that of her husband, Stephan.
7. After Stephan's death in 2005, Debra stated her wish, and as so expressed to her family members, including her nephew, Morgan Quail, and her sister, Catherine Quail, that she did not intend to leave her estate, or any part of it, to Dennis Freeman; however, she was unaware of how and what manner to change the disposition and the purported Amendment to the Trust. Debra was under the mistaken belief that the mere destruction of the Amendment, by tearing it up, resulted in the revocation of the Amendment and would therefore result in the original Trust agreement expressing her true intentions, which included her plan to bequeath and devise all of her trust assets to her direct heirs, including her son, Objector, Christopher Lull. Debra was unable to do so at the time she signed the Amendment because she was wholly under the influence of Stephan, who proposed and dictated to Debra the purported Amendment to the Trust. As a result, the Amendment was not the true and voluntary act of Debra, but was procured as the result of the undue and unreasonable influence and control of Stephan and the mistaken belief thereafter of Debra that she had taken appropriate actions to restore her true testamentary intent, as expressed in the initial Trust Agreement dated 02/16/94.

Objector, Christopher Lull prays for an Order:

1. Denying the Petition; determining that the purported Amendment to the Trust dated 09/14/02 is not the true testamentary intent of Debra Winter; and that the terms and conditions of the trust are those set forth in the original testamentary instrument designated the "Trust Agreement" signed 02/16/94.

**Petition to Determine Title to and Require Transfer of Property to Trust Regarding
Bank Account [Prob. C. 850(a)(2)(3), 855, 17200(b)(6)]**

Stephan DOD: 08/09/05	<p>DENNIS FREEMAN, successor trustee, is Petitioner.</p> <p>Petitioner states:</p> <p>7. Stephan F. Winter and Debbra L. Winter ("Settlers") executed the Stephan F. Winter and Debbra L. Winter Revocable Trust (the "Trust") on 02/16/94 in their capacity as Settlers and initial Trustees. The Trust was amended on 09/14/02.</p> <p>8. Petitioner is the currently acting successor trustee of the Trust.</p> <p>9. This petition concerns the ownership of Bank of America account no. xxxx xxxx 3919 with a balance of over \$565,000 which was an asset of the Trust.</p> <p>10. Petitioner is informed and believes that Respondent, Christopher Lull, presented Bank of America on or about June 26, 2013 the original 02/16/94 Trust without including the 09/14/02 amendment and wrongfully obtained the balance of the Bank of America Account.</p> <p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> 1. Declaring that Petitioner is the sole owner of the funds in Bank of America account no. xxxx xxxx 3919 and the sums wrongfully removed from said account and that Respondent has no interest in the account or the balance of the account; 2. Directing Respondent to immediately deliver the amounts removed from the account to Petitioner; 3. Directing Respondent to pay Petitioner's attorney's fees and costs; and 4. Awarding Petitioner with exemplary damages against Respondent according to proof. <p align="center">Continued on Page 2</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 01/28/14</u></p>
Debbra DOD: 05/13/13		
Cont. from 081213, 102113, 112013, 120913, 010614, 012814		
<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 checked="" 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		
	<p>Reviewed by: JF</p> <p>Reviewed on: 03/05/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4B – Winter</p>	

Objection filed 08/07/13 by Christopher Lull, Respondent, states:

6. Petitioner does not have standing to bring this Petition. Petitioner is not the trustee because the amendment naming him as trustee was revoked. Morgan Quail witnessed the destruction of the amendment (see *Declaration of Morgan Quail*). Without the amendment, Petitioner is not the trustee or a beneficiary of the Trust and has no vested interest in the Trust.
7. Petitioner is not a relative or heir of Debbra L. Winter.
8. Michele Lane, the real estate agent described in the Petition, was in possession of the original estate planning binder at the time of Debbra Winter's death. Ms. Lane turned over the binder to Respondent because she found his name in the estate documents, and could not locate Petitioner's name in the binder. Because Ms. Lane could not find Petitioner's name in the documents and didn't know who he was, she refused to turn the binder over to him. Respondent's attorney has spoken to Ms. Lane and anticipates that she will be a witness in this matter. Ms. Lane stated to Respondent's attorney that Petitioner admitted to her that he never even met Debbra Winter. This information supports the fact that the amendment was destroyed and not in the original estate planning binder.
9. In the absence of the original, there is a legal presumption that the document was revoked. Additionally, pursuant to Probate Code § 6120(b), we have an act of destruction consistent with the intent to revoke. This presumption cannot be overcome based on the Declaration of Morgan Quail and the expected testimony of Michele Lane.
10. Respondent, Christopher Lull, is the successor trustee of the Trust dated 07/16/94 and the primary beneficiary. He had every right to withdraw the money from Bank of America, as Trustee.

Objector prays for an Order:

3. Denying the Petition to Determine Title to and Require Transfer of Property to Trust Regarding Bank Account; and
4. Denying the Petition to Determine Title to and Require Transfer of Property to Trust.

Declaration of Morgan Quail in Support of Objection filed 08/07/13 states:

5. He is Debbra Winter's nephew and probably one of her closest family members. Debbra felt like a bit of an outsider in their family and felt left out. Declarant always tried to include her in his life events and she always seemed grateful to be included.
6. Their family has a lot of drama. Declarant states that he has tried to stay out of it and remain neutral. He believes that this is why Debbra confided in him and spoke to him about things she might not talk about with others.
7. Approximately 2 years ago on Father's Day, Debbra pulled Declarant aside and asked to talk to him. During their conversation, she removed a document titled amendment to trust from her purse and proceeded to tear it up in front of him. She stated that she wanted to keep her money in the family. Declarant also believes she was having conversations with her sister Catherine and father Stanton about this issue as well.
8. At Christmastime later that year, Declarant received a card from Debbra thanking him for the talk on Father's Day.

4C
Atty
Atty

Stephen & Debra Winter Revocable Trust

Case No. 13CEPR00564

Pape, Jeffrey B. (for Dennis Freeman – Successor Trustee under Amendment/Petitioner)
Shahbazian, Steven L. (for Christopher Lull – son of Debra Winter/Respondent-Objector)

Notice of Hearing on Demurrer and Demurrer of Respondent Dennis Freeman to
Petition to Determine Validity of Purported Trust, for Order Determining Interest in
Trust Property and for Reformation; Memorandum of Points and Authorities in
Support of Demurrer to Petition Without Leave to Amend

Stephan DOD: 08/09/05		NEEDS/PROBLEMS/COMMENTS: Examiner Notes are not prepared for this matter. <u>Note to Judge:</u> Research Attorney Danell Love to provide memo regarding this matter.
Debra DOD: 05/13/13		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<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 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:
		Reviewed on:
		Updates:
		Recommendation:
		File 4C – Winter

4C

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 10/23/2013	DEBRA L. HALL , daughter, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 2/10/14. Minute order states Ms. Edwards [Georgie Edwards, daughter] who is appearing via CourtCall objects to the petition. Ms. Edwards is directed to lodge her written objections with the court. As of 3/4/14 written objections have not been filed.
	40 days since DOD.	
	No other proceedings.	
Cont. from 012714, 021014	Will dated 1/5/10 devises entire estate to Debra L. Hall.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	I & A - \$70,000.00	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner requests court determination that Decedent's interest in real property pass to her pursuant to Decedent's Will.	
<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		
		Reviewed by: KT
		Reviewed on: 3/5/14
		Updates:
		Recommendation:
		File 5 – Hall