



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.

Co-Trustees' Motion to Join Indispensable Parties

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Examiner Notes are not prepared for this matter.</p>
DOD:		
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: skc
		Reviewed on: 3-11-14
		Updates:
		Recommendation:
		File 1 - McCann

(1) First and Final Account and Report of Administrator and Petition for Its Settlement and (2) Allowance of Statutory Commissions and (3) For Final Distribution

DOD: 04/13/12	DARRYL GRANT , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 04/13/12 – 01/31/14	
	Accounting - \$70,000.00	
Cont. from	Beginning POH - \$67,000.00	
<input type="checkbox"/> Aff.Sub.Wit.	Ending POH - \$39,791.26 (all cash)	
<input checked="" type="checkbox"/> Verified	Administrator - \$2,800.00 (statutory)	
<input checked="" type="checkbox"/> Inventory	Attorney - \$2,800.00 (statutory)	
<input checked="" type="checkbox"/> PTC	Costs - \$2,266.80 (filing fees, publication, certified copies, bond premium, probate referee)	
<input checked="" type="checkbox"/> Not.Cred.	Reserve - \$700.00	
<input checked="" type="checkbox"/> Notice of Hrg	Distribution, pursuant to intestate succession, is to:	
<input checked="" type="checkbox"/> Aff.Mail w/	Darryl Grant - \$15,612.23	
<input type="checkbox"/> Aff.Pub.	Raymond Grant - \$15,612.23	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters 06/15/12		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" 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 checked="" type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 03/12/14
		Updates:
		Recommendation: SUBMITTED
		File 2 – Grant

(1) Report and Petition of Administrator for (2) Final Distribution (Account Waived)

DOD: 12/23/12		ERIC M. THUAT, Administrator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Paragraph 21 of the Petition indicates that the attorney is reducing his fee to 85% of the statutory amount (\$18,075.69), but states that the agreed upon attorney fee is \$16,268.24 at item 4 of the prayer. Need clarification as to what the correct attorney fee is. The dollar value of the property on hand is not stated in the Petition. Need dollar value of property on hand. The Order does not comply with Local Rule 7.6.1A which states: all orders or decrees in probate matters must be complete in themselves. Orders shall set forth all matters ruled on by the court, the relief granted, and the names of persons, descriptions of property and/or amounts of money affected with the same particularity required of judgments in general civil matters. Monetary distributions must be stated in dollars, and not as a percentage of the estate. Need revised Order stating the dollar amount to be distributed. 	
		Accounting is waived.		
Cont. from		I & A - \$913,276.06		
<input type="checkbox"/>	Aff.Sub.Wit.	POH - ?? (see note 2)		
<input checked="" type="checkbox"/>	Verified	Administrator - waived		
<input checked="" type="checkbox"/>	Inventory	Attorney - \$18,075.69? (less than statutory, see note 1)		
<input checked="" type="checkbox"/>	PTC	Reserve - \$5,000.00		
<input checked="" type="checkbox"/>	Not.Cred.	Distribution, pursuant to intestate succession, is to:		
<input checked="" type="checkbox"/>	Notice of Hrg	Katherine Meux Thuat - Real property, Schwab one portfolio account, 1/3 interest in Schwab one accounting ending in 7377, Bank of America account ending in 8378, 2010 Lexus and miscellaneous furniture and furnishings		
<input checked="" type="checkbox"/>	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters	04/16/13		
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
<input checked="" type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
<input checked="" type="checkbox"/>	FTB Notice			
				Reviewed by: JF
				Reviewed on: 03/12/14
			Updates:	
			Recommendation:	
			File 3 – Meux	

(1) Petition for Final Distribution on Waiver of Account and (2) for Allowance of Compensation for Ordinary Services

DOD: 3-13-13	SANDRA L. FUNK , Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:	
	Accounting is waived.		
Cont. from 022014	I&A: \$534,362.68 POH: \$519,458.67 (cash)		
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input checked="" type="checkbox"/> Inventory	Executor (Statutory): Waived		
<input checked="" type="checkbox"/> PTC	Attorney (Statutory): Waived		
<input checked="" type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg	Distribution pursuant to Decedent's will:		
<input checked="" type="checkbox"/> Aff.Mail	W		
<input type="checkbox"/> Aff.Pub.	Sandra L. Funk, as Trustee of the Floyd Zielke 2013 Trust: \$519,458.67		
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" 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 checked="" type="checkbox"/> FTB Notice			
			Reviewed by: skc
			Reviewed on: 3-12-14
		Updates:	
		Recommendation: SUBMITTED	
		File 4 – Zielke	

Petition for Probate Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 12/31/2013		<p>RENEE SHOEMAKER, daughter is petitioner and requests appointment as Administrator without bond.</p> <p>All heirs waive bond and nominate petitioner.</p> <p>Full IAEA - ?</p> <p>Decedent died intestate</p> <p>Residence: Selma Publication: Need</p> <p>Estimated value of the Estate: Personal property - \$13,200.00 Real property - \$22,000.00 Total - \$35,200.00</p> <p>Probate Referee: Rick Smith</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Affidavit of Publication.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Friday, 08/22/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Friday, 05/22/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from			
<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. x		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" 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: LV	
		Reviewed on: 03/12/2014	
		Updates:	
		Recommendation:	
		File 6 – Richardson	

Status Hearing Re: Settlement Agreement

	<p>RICHARD ROSS filed <i>Second Amended Complaint for Breach of Fiduciary Duty and FRAUD</i> [emphasis in original] on 2-4-10.</p> <p>SUSAN ROSS ALLEY filed <i>Answer to Plaintiff's Second Amended Complaint</i> on 3-22-10.</p> <p>On 9-2-10, Richard Ross filed a Notice of Motion to Compel Further Responses to Discovery Requests. On 12-16-10, Judge Kazanjian granted that motion and ordered Ms. Alley to provide further responses and pay \$905 sanctions.</p> <p>On 3-26-12, RICK ROSS and RICHARD ROSS opened a new case 12CEPR00278 and filed a new Petition to Compel Accounting, Surcharge and Remove Trustee. The matter was continued, and on 6-5-12, an Amended Petition was filed.</p> <p>On 7-5-12, the matter was set for trial on 2-5-13, which was continued to 2-19-13.</p> <p>On 2-14-13, the parties reached settlement and were ordered to file agreement. However, at status hearing on 4-5-13, no agreement had been filed, and the Court continued the matter and also set this outstanding matter 09CEPR00285 for status hearing on the Second Amended Complaint that has been outstanding since 2010.</p> <p>At the last Settlement Conference Hearing (there have been numerous in this matter) the parties reached a settlement. Minute Order from 02/13/14 set this matter for status regarding the Settlement Agreement and states: Parties engage in settlement discussions with the Court. Matter resolved. Upon inquiry by the Court, each party individually agrees to the terms and conditions of the settlement. Court to retain jurisdiction. Counsel to prepare the agreement.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>As of 03/12/14, nothing further has been filed in this matter.</u></p> <p>Note: There are <u>numerous</u> cases regarding this decedent and his testamentary trusts involving these parties:</p> <ul style="list-style-type: none"> • 0557330-8 Estate of Earl Jackson Ross (Estate settled 9-29-97; Created testamentary trusts: Earl J. Ross Marital and Earl J. Ross Family Trusts) • 04CEPR00370 Earl Jackson Ross Trust Affirmed on appeal 4-12-10. (Examiner has not reviewed that file at this time to determine what the judgment was that was affirmed.) • 05CECG01626 Rick Ross vs. Susan Alley (dismissed, dismissal affirmed on appeal 7-18-07) • 08CECG02515 Richard Ross vs. Susan Alley Contained two causes of action and a <u>prayer to reopen the original probate</u>, and for damages and costs. Specifically, Plaintiff sought to determine ownership of the <u>Idaho property</u> where he resided with Decedent, alleging it was fraudulently transferred to Ms. Alley in 1994. An Amended Complaint was filed 8-17-09. A Demurrer was filed and it was ruled to transfer the case to Probate as 09CEPR00285 Matter of Earl Jackson Ross. • 09CEPR00285 Matter of Earl Jackson Ross 1-25-10 Judge Kazanjian signed an order on the Demurrer overruling the first cause of action (extrinsic fraud) and sustaining the second cause of action (breach of fiduciary duty) with leave to amend. Second Amended Complaint was filed 2-4-10; Answer filed 3-22-10. Richard Ross filed Notice of Motion to Compel Further Responses to Discovery Requests on 9-2-10; granted 12-16-10 with \$905 sanctions. • 12CEPR00278 Earl J. Ross Marital and Earl J. Ross Family Trust (Rick Ross, Richard Ross, Petitioners, v. Susan Clarke Ross Alley)
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: JF
		Reviewed on: 03/12/14
		Updates:
		Recommendation:
		File 7 – Ross

DOD: 7/29/2010	FRANK SCOTT HINE was appointed Administrator with Full IAEA and bond set at \$118,260.00 on 1/5/2011.	NEEDS/PROBLEMS/COMMENTS: 1. Need First Account, Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.																							
	Minute order dated 6/15/2012 states the court orders bond set at \$45,000.00 and Limited IAEA authority.																								
	Bond of \$45,000.00 filed on 8/10/12.																								
	Letters issued 10/24/12.																								
	Inventory and Appraisal filed on 6/6/2012 showing the estate valued at \$134,550.00																								
Cont. from 062113, 080213, 091313, 111513																									
Aff.Sub.Wit.																									
Verified																									
Inventory																									
PTC																									
Not.Cred.																									
Notice of Hrg																									
Aff.Mail																									
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9202																									
Order																									
Aff. Posting																									
Status Rpt																									
UCCJEA																									
Citation																									
FTB Notice																									
	Creditor's Claims filed: <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">CitiBank</td> <td style="width: 5%; text-align: center;">-</td> <td style="width: 35%; text-align: right;">\$12,563.66</td> </tr> <tr> <td>DCM Services</td> <td style="text-align: center;">-</td> <td style="text-align: right;">\$ 260.80</td> </tr> <tr> <td>Frank Hine</td> <td style="text-align: center;">-</td> <td style="text-align: right;">\$ 4,743.41</td> </tr> <tr> <td>Donna Langley</td> <td style="text-align: center;">-</td> <td style="text-align: right;">\$17,625.99</td> </tr> <tr> <td>Wesley Langley</td> <td style="text-align: center;">-</td> <td style="text-align: right;">\$ 1,397.38</td> </tr> <tr> <td>FTB</td> <td style="text-align: center;">-</td> <td style="text-align: right;">\$ 2,660.09</td> </tr> <tr> <td>FTB</td> <td style="text-align: center;">-</td> <td style="text-align: right;">\$ 4,337.54</td> </tr> <tr> <td>Total</td> <td></td> <td style="text-align: right;">\$43,689.17</td> </tr> </table>	CitiBank	-	\$12,563.66	DCM Services	-	\$ 260.80	Frank Hine	-	\$ 4,743.41	Donna Langley	-	\$17,625.99	Wesley Langley	-	\$ 1,397.38	FTB	-	\$ 2,660.09	FTB	-	\$ 4,337.54	Total		\$43,689.17
CitiBank	-	\$12,563.66																							
DCM Services	-	\$ 260.80																							
Frank Hine	-	\$ 4,743.41																							
Donna Langley	-	\$17,625.99																							
Wesley Langley	-	\$ 1,397.38																							
FTB	-	\$ 2,660.09																							
FTB	-	\$ 4,337.54																							
Total		\$43,689.17																							
	Former Status Report filed 9/9/13 states Mr. Krbechek met with Mr. Hine since the last status conference. Mr. Hine will be present in court on 9/13/13 to provide updated information regarding the status of the estate. The beneficiary of the estate is the decedent's minor daughter, Noelle Hine. Ms. Hine will turn 18 before the end of this year. Mr. Hine has been making all the monthly payments on the house and the loan is current. Ms. Hine's future is uncertain and she is not ready to own a house. Thus, it is in the best interest of the estate that the house be sold. The personal representative will provide an update regarding the status of the property listing at the next hearing.																								
		Reviewed by: KT Reviewed on: 3/12/14 Updates: Recommendation: File 9 - Hine																							

Former Status Report of Randolph Krbechek filed on 11/14/13 states he has met with Mr. Hine several times since the last hearing. Mr. Hine reports that he has completed most of the tasks to close the estate. The home is listed for sale and is in good, saleable condition. It is anticipated that they will be receiving offers in the foreseeable future. Sale of the real property must be confirmed by the court.

DOD: 08/28/11	<p>SUSAN J. QUINN and RHONDA WALLACE, were appointed Co-Executors without bond on 11/08/11. Letters were issued on 11/21/11.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
	<p>Inventory & Appraisal, Final filed 04/10/12 - \$499,722.31</p>	<p>CONTINUED FROM 11/18/13</p>
	<p>Inventory & Appraisal, Supplemental filed 04/18/13 - \$41,158.54</p>	<p>1. Need Final/Supplemental Account and/or Petition for Final Distribution.</p>
Cont. from 091313, 111813	<p>First & Final Account and Report of Executor filed 10/09/12 and set for hearing on 11/19/12.</p>	
Aff.Sub.Wit.	<p>Minute Order from 11/19/12 set this matter for status and states: The Court advises counsel that it is treating this as a Petition for Preliminary Distribution. The Court grants a distribution of up to 80% of the estate and compensation. Counsel is directed to submit a revised order.</p>	
Verified	<p>Status Report on Continued Administration filed 03/10/14 states: on 10/09/12, the co-executors filed their first account and report and petition for distribution. On 11/20/12, the Court entered an order authorizing distribution of substantially all of the assets of the estate, save and accepting the retention of cash for tax liabilities; the court also ordered payment of 80% of statutory attorney fees and extraordinary compensation. The Court ordered that estate administration continue pending the receipt of funds from the unclaimed property division of the State Controller's office in the amount of \$41,158.54 as set forth on the supplemental inventory and appraisal.</p>	
Inventory	<p>Those funds were received on 12/07/12. Subsequently, the co-executors have been dealing with the IRS. The decedent did not file tax returns for 2008 or 2009. In filing a return for 2010, the Executors were advised of the missing returns. In filing those returns, the executors were advised that the decedent's identity had been stolen and a false return filed for 2010 in which an erroneous refund was claimed, which refund affected the prior year's returns. Working with a CPA to address the situation, corrected returns have been filed. The IRS assessed penalties on the late filed returns, and the estate sought abatement of those penalties. The executors have been advised to contact the IRS Taxpayer Advocate Service to resolve the issue, but that has not taken place yet.</p>	
PTC	<p>The co-executors distributed \$48,600.00 each to Alison Quinn and Brian Quinn, representing dividends on Quinn Company stock, and retained \$10,000.00 from each distribution towards income taxes payable by the estate on such dividends. The amount of income taxes payable by the estate on account thereof was the sum of \$9,920.00 and co-executors have now distributed the sum of \$10,800 (\$5,040 to each) as the balance of such distribution.</p>	
Not.Cred.	<p>Following the period of the account, the estate received an additional \$31,200 representing dividends on Quinn Company stock, which was distributed to Alison Quinn and Brian Quinn (\$15,600 each). The estate's bank account will have \$75,745.99 after payment of fees for preparation of the estates income tax returns. The amount at issue with the IRS is \$15,000. The executors anticipate that within 120 days they will be able to address the penalties with the taxpayer's advocate's division of the IRS and resolve the matter so the estate can be closed.</p>	
Notice of Hrg		
Aff.Mail		<p>Reviewed by: JF</p>
Aff.Pub.		<p>Reviewed on: 03/12/14</p>
Sp.Ntc.		<p>Updates:</p>
Pers.Serv.		<p>Recommendation:</p>
Conf. Screen		<p>File 10 - Quinn</p>
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 7-1-12	<p>GEORGE P. PAPPAS was appointed Executor with Full IAEA without bond on 4-25-13 and Letters issued on 5-1-13.</p> <p>At hearing on 4-25-13, the Court set this status hearing for filing the Inventory and Appraisal.</p> <p>Status Report filed 9-24-13 states the decedent's estate consists primarily of interests in legal entities (one corporation and five general partnerships) for which appraisal is being obtained and one partial interest in a piece of real property for which a sale has been completed. The appraiser engaged by the personal representative is currently working on finalizing the appraisals of the decedent's interests in the entities mentioned above. Once complete, the personal representative intends to either submit to the probate referee for his appraisals, or request waiver of the probate referee appraisal. Status report requests continuance to 11-22-13.</p> <p>Status Report filed 1-30-14 states the I&A has been sent to the Probate Referee. Attorney Poochigian requests 45 days.</p>	NEEDS/PROBLEMS/COMMENTS:
		<u>Continued from 9-27-13, 11-22-13, 1-31-14</u>
Cont. from 092713, 112213, 013114		Minute Order 9-27-13: Counsel informs the Court that they are in the process of getting appraisals for the decedent's property.
Aff.Sub.Wit.		Minute Order 11-22-13: No appearances. Continued to 1-31-14. A copy of the minute order was mailed to Mr. Poochigian 12-11-13.
Verified		Minute Order 1-31-14: Mr. Poochigian is appearing via Courtcall. Continued to 3-17-14.
Inventory		As of 3-11-14, nothing further has been filed.
PTC		1. Need Inventory and Appraisal.
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: skc	
	Reviewed on: 3-11-14	
	Updates:	
	Recommendation:	
	File 11 – Pappas	

Status Hearing Re: Filing of Receipt for Blocked Account

DOD: 08/17/12		<p>EDWARD SIMPSON, brother, was appointed Administrator with Limited IAEA, without bond, with deposits of \$1,000,000.00 to be placed into a blocked account on 10/16/13. Letters of Administration were issued on 10/22/13.</p> <p>Status Hearing Report filed 11/12/13 states: The only assets of the estate are an insurance policy for \$1,000,000.00 and a possible worker's compensation claim as the decedent died while working. In the car accident that killed the decedent, there was a passenger who was injured. That passenger is making a claim against the insurance policy. The passenger hired an attorney and is seeking the full \$1,000,000.00. There are depositions scheduled for mid-December and the passenger still needs to go through a medical evaluation before the parties can go back to mediation. The Administrator is still trying to ascertain if the estate will receive a distribution from a worker's comp claim. Receipts cannot be filed because there are no funds to deposit at this time. No life insurance funds will be distributed until the matter with the passenger is settled. A 60 day continuance is requested.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 11/15/13</u></p> <p>1. Need Receipt & Acknowledgement of Order for the Deposit of Money into Blocked Account.</p> <p>Note: It does not appear that an Order to Deposit Money into Blocked Account has been submitted/signed.</p>
Cont. from 111513			
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>Reviewed by: JF</p> <p>Reviewed on: 03/12/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12A – Simpson</p>	

DOD: 08/17/12		<p>EDWARD SIMPSON, brother, was appointed Administrator with limited IAEA, without bond, with deposits of \$1,000,000.00 to be placed into a blocked account on 10/16/13.</p> <p>Letters of Administration were issued on 10/22/13.</p> <p>Minute order dated 8/20/13 set this status hearing for the filing of the inventory and appraisal.</p> <p>Status Report filed on 1/17/14 states the only assets of the estate are an insurance policy for \$1,000,000.00 and a possible worker's compensation claim as the decedent died while working.</p> <p>In the car accident that killed the decedent, there was a passenger who was injured. That passenger is making a claim against the insurance policy. The passenger hired an attorney and is seeking the full \$1,000,000.00. The parties are still in the middle of discovery and are trying to reach a settlement.</p> <p>An inventory and appraisal cannot be filed until they know how much of the life insurance proceeds will come into the estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 01/21/14</u></p> <ol style="list-style-type: none"> Need inventory and appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from 012114			
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>Reviewed by: JF</p> <p>Reviewed on: 03/12/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12B – Simpson</p>	

Page 2

Petitioners state the establishment of a special needs trust is to the advantage of the Conservatee and appropriate for the following reasons:

- The Conservatee has a disability that substantially impairs his ability to provide for his own care or custody and constitutes a substantial handicap
- The Conservatee has been a resident of Wish-I-Ah Skilled Nursing & Wellness Centre, LLC, in Auberry, CA, since approx. 2010. It is believed he will remain in a skilled nursing facility for the balance of his lifetime.
- The Conservatee is eligible for and is currently receiving approx. \$4,000/month in Medi-Cal benefits, all of which is applied against his medically necessary expenses and pays all of the cost of his board and care at Wish-I-Ah.
- A distribution from the trust to the Conservatee will result in ineligibility for the Medi-Cal nursing home benefits he is currently receiving and will interfere with his continued board and care at Wish-I-Ah or any other skilled nursing facility.
- If the Conservatee becomes ineligible for Medi-Cal nursing home benefits, the actual cash available for distribution (\$34,000.00 per petition, actually \$5,000.00 per declaration) would be depleted in less than one year.

Pursuant to federal law, if the SNT is established prior to age 65, the exception continues to apply after the individual reaches age 65. This Court has jurisdiction to authorize establishment of a SNT under Probate Code §2580 (substituted judgment) (authority provided).

A declaration as to the value of the trust and in support of this petition is provided by attorney Paul T. Chambers, attorney for Petitioners as Co-Trustees of The Satterberg Family Trust.

Declaration of Attorney Boyett filed 3-10-14 provides additional information regarding the value of the proposed SNT and also provides a revised proposed SNT because the form of SNT previously submitted inadvertently included provisions that were overbroad. The SNT as revised complies with applicable federal and state law, including 42 USC § 1396p(d)(4)(A) and Cal. Rules of Court 7.903.

Petitioners pray for an order:

- 1. Petitioners, as co-conservators, are authorized to direct the co-trustees of the Satterberg Family Trust, Exemption Trust to distribute all of the assets from the Exemption Trust due George William Satterberg, Jr., to a special needs trust established under Probate Code §2580(b)(5) for the benefit of George William Satterberg, Jr., Conservatee;**
- 2. None of the assets distributed to the special needs trust for the benefit of George William Satterberg, Jr., from the trust are to be considered as having been received by George William Satterberg, Jr., or the co-conservators of his estate;**
- 3. That the form of the proposed trust attached to the Declaration filed 3-10-14 be approved;**
- 4. That Petitioners Janet L. Lorensen and Harriet Satterberg are appointed as the co-trustees of the special needs trust created for the benefit of George William Satterberg, Jr.; and**
- 5. For such other and further orders as the Court may deem proper.**

Petition for Appointment of Temporary Conservatorship of the Person (Prob. C. 2250)

Age: 67		<u>GENERAL HEARING: 04/08/14</u>		NEEDS/PROBLEMS/COMMENTS:		
		<p>JIMMY ASHLOCK, non-relative, is Petitioner and requests appointment as Temporary Conservator of the Person.</p>				
Cont. from		<p>Petitioner states that the proposed conservatee needs assistance with counting money, cooking and daily living activities.</p>		<ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service at least 5 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Conservator</i> on the Proposed Conservatee. 3. Need proof of service by mail at least 5 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Conservator</i> for: <ol style="list-style-type: none"> a. Gloria Smith (mother) b. Connie Cunningham (sister) c. Brian Wright (son) d. Matthew Wright (son) e. Jonathan Wright (son) f. Catherine Thurman (granddaughter) g. Brandon Wright (grandson) 4. Need Confidential Guardian Screening Form (GC-212). 		
<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 type="checkbox"/>	Notice of Hrg	x	Court Investigator Jennifer Daniel filed a report on 03/11/14.			
<input type="checkbox"/>	Aff.Mail	x				
<input type="checkbox"/>	Aff.Pub.					
<input type="checkbox"/>	Sp.Ntc.					
<input type="checkbox"/>	Pers.Serv.	x				
<input type="checkbox"/>	Conf. Screen	x				
<input checked="" type="checkbox"/>	Letters					
<input checked="" type="checkbox"/>	Duties/Supp					
<input type="checkbox"/>	Objections					
<input checked="" 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: 03/12/14		
				Updates:		
				Recommendation:		
				File 17 – Wright		

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Age: 12		GENERAL HEARING 05/05/14		NEEDS/PROBLEMS/COMMENTS:	
		<p>JACQUELINE SMITH, paternal aunt, is Petitioner.</p> <p>Father: HOWARD MASON – Consent & Waiver of Notice filed 03/05/14</p> <p>Mother: TIYEONDREA MCGLOTHIN – Personally served on 03/10/14 with Notice of Hearing only for the general hearing on 05/05/14</p> <p>Paternal grandfather: BILLY MASON Paternal grandmother: MAGNOLIA HEADLEY</p> <p>Maternal grandparents: UNKNOWN</p> <p>Petitioner states that the since May 2013, Absalom's mother has been dropping him off at the paternal grandmother's home and leaving him for long periods of time. The mother began locking the minor out of her home and has stated that she does not want him in her home. Petitioner requests temporary guardianship so that she can help her nephew.</p>		<ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i> for the temporary hearing on 03/17/14. 2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> for the 03/17/14 hearing with a copy of the <i>Temporary Guardianship Petition</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: <ol style="list-style-type: none"> a. Tiyendrea McGlothlin (mother) Note: Proof of personal service filed 03/11/14 attached to the <i>Notice of Hearing</i> on the 05/05/14 hearing does not indicate that a copy of the <i>Petition</i> was served with the <i>Notice of Hearing</i> as required per the Probate Code. 	
Cont. from					
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
	Notice of Hrg	x			
	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	x			
✓	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: 03/12/14	
				Updates:	
				Recommendation:	
				File 18 – Mason	