



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.

Third Report and Account of Trustee; Petition for its Settlement and Allowance of Attorneys Fees

	MARIA ALVAREZ-GARCIA , Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 03/12/15</u> 1. Need Order.
	Account period: 08/17/13 – 11/18/14	
Cont. from 031215	Accounting - \$201,488.06	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$184,205.54	
<input checked="" type="checkbox"/> Verified	Ending POH - \$177,818.06	
<input type="checkbox"/> Inventory	(\$145,994.48 cash, plus vehicle)	
<input type="checkbox"/> PTC	Conservator - not requested	
<input type="checkbox"/> Not.Cred.	Attorney - \$1,050.00 plus costs of \$435 (Total \$1,485.00)	
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner states the trust funds are invested in a blocked account, the monthly annuity payments of \$1,151.00 are made directly to the blocked account, and funds may not be withdrawn without prior court order. Further, the trustee is not receiving any trustee fees. Therefore, Petitioner requests that future accounts be biennial.	
<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 type="checkbox"/> Order x		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice	Petitioner prays for an Order: 1. Settling, allowing and approving the Third Report and Account; 2. Ratifying and approving all acts and transactions of the Trustee as set forth in this Third Report and Account; 3. Authorizing payment of the attorney fees and costs from the blocked account; 4. That future accountings be biennial; and 5. Such further order be made as the Court considers proper.	
		Reviewed by: JF
		Reviewed on: 04/14/15
		Updates:
		Recommendation:
		File 1 - Carbajal

Second Account and Report of Trustee Petition for Settlement, for Mileage Reimbursement, Commissions and Fees to Trustee and Attorney

	BRYAN JENSEN , son and Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 1/1/2013 – 12/31/2014	Continued from 3/4/2015. Minute Order states matter continued at the request of counsel. [Note: Highlighted text indicates responses to previously raised issues.]
	Accounting - \$26,400.00	
	Beginning POH - \$25,988.99	
	Ending POH - \$12,397.05	
	(all cash)	
Cont. from 030415		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Trustee - \$500.00	Note: BRYAN JENSEN, son, was appointed Conservator of the Person and Estate on 4/1/2009 in Case 09CEPR00152 . Conservatee has resided in Los Angeles County since 11/12/2010. Order on Petition for Transfer filed 11/19/2014 grants the Court Investigator's Petition to Transfer the Proceedings to Los Angeles. The case file was sent to Los Angeles County on 12/9/2014 by certified mail. Receipt of Transfer has not been received by this Court from Los Angeles County. Minute Order dated 4/1/2015 states counsel requests 6 months, and continued the Probate Status Hearing Re: Receipt of Transfer to Los Angeles County to 10/7/2015 .
<input type="checkbox"/> Inventory	(for trustee's services @ \$27.15 per hour (consisting of 1/2 Petitioner's usual \$54.29 hourly rate as sergeant for Santa Barbara Police Dept.; total 192 hours would result in fee of \$5,212.00;)	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Trustee Costs - \$1,518.00	Note: Upon this Court granting the transfer to Los Angeles County, all documents contained in the Fresno County Superior Court file were sent to Los Angeles County Superior Court; hence, this Court's file does not contain a copy of the DEBRA J. JENSEN SPECIAL NEEDS TRUST . Court may require Petitioner to provide this Court with a copy of the DEBRA J. JENSEN SPECIAL NEEDS TRUST for the case file 13CEPR00766 to support Petitioner's assertion in the Declaration Re Needs / Problems / Comments filed 3/6/2015 that there was no requirement for a surety bond in the special needs trust.
<input checked="" type="checkbox"/> Aff.Mail	(for 2,760 miles @ \$0.55/mile, for travel from Petitioner's home in Santa Barbara to Beneficiary's convalescent facility in Gardena; for trust business matters, to review Beneficiary's care, condition, mental and physical status, and personal visits.)	~Please see additional page~
<input type="checkbox"/> Aff.Pub.	Attorney - \$500.00	Reviewed by: LEG
<input type="checkbox"/> Sp.Ntc.	(per Local Rule 7.19.2 for 2.50 hours @ \$200.00/hour;)	Reviewed on: 4/14/15
<input type="checkbox"/> Pers.Serv.	Accountant - \$750.00	Updates:
<input type="checkbox"/> Conf. Screen	(paid)	Recommendation:
<input type="checkbox"/> Letters	Bond - \$25,988.66	File 2 - Jensen
<input type="checkbox"/> Duties/Supp	(filed in Conservatorship 09CEPR00152 ; bond rider filed 8/26/2013 increasing bond from \$23,328.06 to \$25,988.66; no bond issued for the instant SNT Case 13CEPR00766;)	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 2620		
<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		
	~Please see additional page~	

Petitioner prays for an Order:

1. Settling and allowing the Second Account and Report of the Trustee, and confirming the acts of Petitioner as Trustee;
2. Authorizing payment of the Trustee's commission and Attorney fees; and
3. Allowing mileage reimbursement to Petitioner.

NEEDS/PROBLEMS/COMMENTS, continued:

1. Pursuant to Probate Code § 2621 and 1461(b)(2), need notice of hearing and proof of service of notice with a copy of the petition showing at least 15 days' service by mail to the State Director of Health Services, the Director of Mental Health, and the Director of Developmental Services. *Declaration Re Needs / Problems / Comments* filed 3/6/2015 states the Conservatee resides in an Alzheimer's care facility which is not subject to Probate Code § 2621 and 1461(b)(2) notices.
2. *Schedule B, Disbursements* shows payments for bond premiums of **\$143.47** on 2/12/2013 and of **\$157.04** on 10/21/2013. Bond has not been filed for the Debra Jensen Special Needs Trust, **Case 13CEPR00766**, such that these bond payments appear to be for the Conservatorship bond. Need proof of bond issued to Bryan Jensen as Trustee of the Debra Jensen Special Needs Trust in **Case 13CEPR00766** in the sum of **\$14,076.76** pursuant to Probate Code § 2320(c)(4) and CA Rule of Court 7.903(c)(5). *Declaration Re Needs / Problems / Comments* filed 3/6/2015 states that there was no requirement for a surety bond in the special needs trust.
3. *Schedule B, Disbursements* shows the following disbursements totaling **~\$1,328.22** for cigarettes for the Beneficiary, which do not appear to be appropriate disbursements from the SNT for special needs of the Beneficiary:
 - 3/5/2013 of **\$134.24** for two cartons cigarettes and **\$15.32** in postage to mail cigarettes;
 - 6/19/2013 of **\$70.84** for one carton cigarettes; '
 - 6/19/2013 (same date entry) of **\$135.32** for two cartons cigarettes;
 - 10/19/2013 of **\$135.54** for two cartons cigarettes;
 - 12/10/2013 of **\$135.54** for two cartons cigarettes;
 - 1/21/2014 of **\$205.58** for cigarettes;
 - 4/9/2014 of **\$137.05** for cigarettes;
 - 7/16/2014 of **\$218.82** for cigarettes and shampoo;
 - 12/18/2014 of **\$139.97** for two cartons cigarettes.*Declaration Re Needs / Problems / Comments* filed 3/6/2015 states the multiple disbursements of **\$1,328.22** were all for the beneficiary; she has smoked cigarettes all of her adult life; she becomes very agitated when an attempt is made to limit her smoking; smoking has a calming effect on her.
4. *Schedule B, Disbursements* shows payment of **\$435.00** on 8/28/2013 for "account filing fee." Court records show payment on 8/28/2013 in Case 13CEPR00766 of a filing fee of **\$200.00** rather than **\$435.00**. Court records show a payment of **\$435.00** was made in Case 09CEPR00152 on 8/26/2013. Need clarification of whether the entry on 8/28/2013 is for the **\$200.00** fee for the SNT, which results in an overcharge to the SNT of **\$235.00**, or if the entry is intended to be for the 8/26/2013 fee of **\$435.00** for the Conservatorship. *Declaration Re Needs / Problems / Comments* filed 3/6/2015 states the 8/26/2013 entry should have been identified as a conservatorship account filing fee.

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS, continued:

5. *Schedule B, Disbursements* shows payment to Bryan Jensen (Petitioner/Trustee) for fees and mileage of **\$3,090.00**, and payment to Attorney Shepard of **\$1,250.50** for fees and **\$435.00** for costs, which may be for the Second Account of the Conservatorship per Order filed 1/9/2014, though *Schedule B* does not specify the date of the Court order, or that these payments disbursed from the SNT were for the Conservatorship services and fees. Need clarification. (Conservatorship file documents have been sent to Los Angeles and cannot be checked for verification of fees ordered.) *Declaration Re Needs / Problems / Comments* filed 3/6/2015 states these payments relate to the Order Settling Amended / Corrected Second Account in the Conservatorship, and were made from the special needs trust account in order to maintain a working balance in the special needs trust beneficiary's conservatorship bank accounts.

Note: Court will set a status hearing as follows:

- **Thursday, February 4, 2016 at 9:00 a.m. in Dept. 303** (1-year account) for filing of the third account.

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.

3 Agnes Maude Glendenning (Estate)

Case No. 13CEPR00794

Atty Johnson, Mark D. (for Eugene E. Glendenning – Executor/Petitioner)

**(1) Petition for Settlement of First and Final Account and (2) for Final Distribution,
(3) Approval of Attorney Fees and Waiver of Commissions**

DOD: 07/13/05	EUGENE E. GLENDENNING , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 07/13/05 – 08/01/14	
Cont. from	Accounting - \$398,357.83	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$398,357.83	
<input checked="" type="checkbox"/> Verified	Ending POH - \$398,357.83 (\$2,040.23 is cash)	
<input checked="" type="checkbox"/> Inventory	Executor - waived	
<input checked="" type="checkbox"/> PTC	Attorney - \$10,967.00 (statutory)(to be paid outside of the estate)	
<input checked="" type="checkbox"/> Not.Cred.	Closing - \$100.00	
<input checked="" type="checkbox"/> Notice of Hrg	Distribution, pursuant to decedent's will, is to:	
<input checked="" type="checkbox"/> Aff.Mail w/	Eugene E. Glendenning- \$2,040.23 cash, plus real property, common stock and tangible personal property	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters 11/14/13		
<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: 04/14/15
		Updates:
		Recommendation: SUBMITTED
		File 3 - Glendenning

4 Henry Kempf (Estate)

Case No. 13CEPR00884

Atty Krause, Stephanie J. (for Dale Ewing – Administrator/Petitioner)

(1) First and Final Account and Report of Administrator and Petition for its Settlement, (2) for Confirmation and Approval of Acts of Administrator, (3) for Allowance of Compensation to Administrator for Ordinary Services, (4) for Allowance of Compensation to Attorney for Ordinary and Extraordinary Services, and (5) for Final Distribution

DOD: 11/19/11	DALE EWING , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Accounting period: 01/16/14 – 02/20/15	1. Inventory & Appraisal filed 08/19/14 indicates that the assets of the estate total \$37,680.42. However, Petitioner states that the Inventory & Appraisal should indicate assets of \$36,502.17 as a result of an IRA being less than inventoried and personal property having no value. Need corrected Inventory & Appraisal and an amended accounting may be required.
	Accounting - \$71,535.44	2. Declaration of attorney in support of request for extraordinary fees indicates that the decedent was predeceased by all but 1 sister, however the dates of death of deceased siblings is not stated. The Court may require dates of death for:
Cont. from	Beginning POH - \$36,502.17	a. Sophie Schafer
<input type="checkbox"/> Aff.Sub.Wit.	Ending POH - \$54,027.26 (all cash)	b. Katie Bedel
<input checked="" type="checkbox"/> Verified	Administrator - \$2,827.42 (statutory, see note)	c. Dorathy Hannickel
<input checked="" type="checkbox"/> Inventory	Administrator costs - \$3,991.07 (itemized, for payment of estate expenses, filing fees, probate referee, publication, etc.)	d. David Kempf
<input checked="" type="checkbox"/> PTC	Attorney - \$2,827.42 (statutory, see note)	e. Gottlieb Kempf
<input checked="" type="checkbox"/> Not.Cred.	Attorney x/o - \$270.00 (itemized by date for locating heirs)	f. Sophie Scharton
<input checked="" type="checkbox"/> Notice of Hrg	Costs - \$210.00 (bond premium paid by attorney)	
<input checked="" type="checkbox"/> Aff.Mail w/	Closing - \$999.00	Note: The statutory fees are calculated based on \$36,502.17.
Aff.Pub.	Distribution, pursuant to intestate succession, is to:	
Sp.Ntc.	Annie Ewing - \$7,164.53	Reviewed by: JF
Pers.Serv.	Gloria Fishel - \$3,560.81	Reviewed on: 04/14/15
Conf. Screen	Don Schafer - \$3,560.81	Updates:
Letters 01/16/14	Kathleen Barrier - \$3,560.81	Recommendation:
Duties/Supp	Jim Bedel - \$3,560.81	File 4 - Kempf
Objections	Darrell Hannickel - \$2,402.48	
Video Receipt	Anita Hannickel - \$2,402.48	
CI Report	Phyllis Doud - \$2,402.48	
<input checked="" type="checkbox"/> 9202	Stella Kempf - \$3,560.81	
<input checked="" type="checkbox"/> Order	David Kempf - \$3,560.81	
Aff. Posting	Bill Scharton - \$7,164.53	
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		

Atty Salinas, Jamie (pro per Petitioner)

Atty Krbechek, Randolph (for Objector/mother, Jenna Harmon)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		TEMPORARY EXPIRED 3/19/15	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 3/19/15. Minute Order states: Examiner notes handed in open court; Ms. Salinas represents that she will be obtaining counsel. Mr. Krbechek requests that the temporary orders be allowed to dissolve; the Court grants the request. The Court orders that Jenna Harmon pick the minors up from Jamie Salinas on 3/20/15 at 10 a.m. The Court further orders the matter referred to the Department of Social Services for further assessment. Additionally, Jason Surabian, father, shall have visitation, supervised by Jamie Salinas, every other Saturday starting 3/21/15 at the McDonalds in Fowler from noon to 2 p.m. Parties mutually agree to an alternative place. There are to be no other parties brought to the visits and no discussion of this matter with each other.</p> <p>1. Need Notice of Hearing.</p> <p>Please see last page for additional needs/problems/comments</p> <p>Reviewed by: KT</p> <p>Reviewed on: 4/14/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8A – Surabian</p>
		JAMIE ROSE SALINAS, paternal aunt, is petitioner.	
		Please see petition for details.	
Cont. from 031915		Objections to Appointment of Guardian and Demand for Evidentiary Hearing filed on 3/17/15.	
<input type="checkbox"/>	Aff.Sub.Wit.	Court Investigator Report filed on 3/11/15.	
<input checked="" type="checkbox"/>	Verified	Letters in Support of Jamie Salinas' Petition to be appointed as guardian were filed by Jamie Salinas on 3/18/15.	
<input type="checkbox"/>	Inventory	Declaration of Jenna Harmon in Opposition to Petition for Appointment of Guardian filed on 3/18/15	
<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 checked="" type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

NEEDS/PROBLEMS/COMMENTS (cont):

2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition on:
 - a. Jenna Harmon (mother)

3. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on:
 - a. Timothy Surabian (paternal grandfather)
 - b. Cathryn Smith (paternal grandmother)
 - c. Paternal grandparents

Probate Status Hearing RE: Contested Hearing Date

	JAMIE ROSE SALINAS , paternal aunt, petitioned the court to be appointed guardian.	NEEDS/PROBLEMS/COMMENTS:
	The mother, JENNA HARMON , objected.	
	This status hearing was set re: contested hearing date.	
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: 4/14/15
		Updates:
		Recommendation:
		File 8B - Surabian

11 Shirley Haw (Estate)

Case No. 15CEPR00217

Atty Kesselman, Kathi K (for Theodore M. Haw – Petitioner – Spouse)

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

DOD: 02/03/2015		THEODORE M. HAW , spouse/named executor without bond, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Dr. Alfred Wong, decedent's brother, is listed in the decedent's will however he is not listed on attachment 8 of the petition. Need proof of service of the Notice of Petition to Administer Estate on Dr. Alfred Wong pursuant to Probate Code § 8110. <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> Thursday, 08/13/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and Thursday, 06/16/2016 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>
		Full IAEA – o.k.	
		Will dated: 01/09/2003	
Cont. from		Residence: Fresno	
<input type="checkbox"/>	Aff.Sub.Wit.	s/p	
<input checked="" type="checkbox"/>	Verified	Publication: The Business Journal	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Estimated value of the Estate:	
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input checked="" type="checkbox"/>	Aff.Pub.	Probate Referee: Rick Smith	
<input type="checkbox"/>	Sp.Ntc.	Personal property - \$8,500.00	
<input type="checkbox"/>	Pers.Serv.	Real property - \$250,000.00	
<input type="checkbox"/>	Conf. Screen	Total - \$258,500.00	
<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: 04/14/2015			
Updates:			
Recommendation:			
File 11 – Haw			

DOD: 2-7-07	LORENA GARCIA , Daughter is Administrator with limited IAEA without bond. Letters issued 7-21-08.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 042613, 083013, 013014, 050114, 100214, 120414	On 7-14-09 , the Court approved a settlement agreement between Administrator (daughter) and Omega Ochoa Garcia (surviving spouse) and allowed continuation of estate administration pending certain issues: 1) Retrial of the damages portion of Civil Case # 04CECG03607 Garcia v. Roberts; and 2) Receipt of proceeds due from an eminent domain matter	
Aff.Sub.Wit.		
Verified		
Inventory	On 10-4-11 (the 7 th status hearing regarding retrial of the damages issue), Attorney Emerzian advised the Court that a motion for a new trial was denied and an appeal has been filed, and that deposits need to be made.	
PTC		
Not.Cred.		
Notice of Hrg	Status Report filed 8-27-13 states the estate is currently in a holding pattern pending the outcome of the appeal of the civil matter which holds the bulk of the estate property. There have been no funds received into the estate from the \$184,798 awarded in 7/2011 due to the appeal on behalf of the Roberts. The personal property listed on the inventory is currently in the possession of Omega Garcia (spouse). Until the civil matter is decided, we do not know what the final I&A amount will be.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Status Report filed 11-24-14 states an email from Attorney Littlewood of McComrick Barstow, who handled the civil litigation regarding the real property and is also handling enforcement of the judgment with the Sheriff's Dept., on 11-20-14 stated that the Writ of Execution and instructions have been submitted to the sheriff. To date, the Sheriff has not issued a Notice of Sale, and calls to the Sheriff's Dept. have gone unreturned. Attorney Littlewood's colleague, John Hastrup, will attend the hearing on 12-4-14 to give the Court information.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order	Status Report filed 4-14-15 states Attorney John Hastrup is now handling enforcement of the judgment with the Sheriff's Department. The Court ordered the Roberts to appear 5-14-15 and show cause why their property should not be sold to satisfy the judgment. Nothing further can happen until after that date. Ms. LeVan therefore requests a 60 day continuance.	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 4-14-15
		Updates:
		Recommendation:
		File 14 - Garcia

Notice of Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

DOD: 11/25/07	MARGIE GFELLER , Spouse, was appointed as Executor without IAEA authority and without bond on 03/18/08. Letters were issued on 05/13/08.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 12/18/14</u>
Cont. from 010314, 030714, 050214, 073114, 081414, 091814, 121814	Petition for Authority to Administer Estate without Court Supervision filed 06/02/08. Order Granting Authority To Administer Estate Without Court Supervision was filed 07/10/08. Letters Testamentary with Full IAEA Authority were issued on 07/14/08.	
Aff.Sub.Wit.		1. Need Accounting/Report of Administrator and Petition for Final Distribution.
Verified		
Inventory		
PTC	Inventory & Appraisal, partial no. 1 - \$210,000.00	
Not.Cred.		
Notice of Hrg	Inventory & Appraisal, partial no. 2 - \$835,000.00	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Notice of Status Hearing filed 10/31/13 set this matter for status regarding failure to file a First Account and/or Petition for Final Distribution. Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Joanne Sanoian on 10/31/13.	
Letters		
Duties/Supp	Status Hearing Report filed 04/13/15 states: the personal representative was previously represented by Joann Sanoian. After reviewing Ms. Sanoian's files and consulting with the Executor, CPA and members of Ms. Sanoian's staff, it has been determined that Capital One's creditor's claims and federal and state tax liens and/or liabilities must be resolved prior to the preparation of a Petition for Final Distribution. Due to the passage of time, locating the necessary documents to close the estate has been difficult and time consuming. Counsel requests a continuance of 90 days at which time he will be in a position to accurately estimate when the estate will be in a condition to be closed.	
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 04/14/15
		Updates:
		Recommendation:
		File 15 – Gfeller

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Second and Final Account filed on 4/13/15.</p>
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: 4/14/15
		Updates:
		Recommendation:
		File 16 – De La Mora

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

		TEMPORARY EXPIRES 4/16/15	NEEDS/PROBLEMS/COMMENTS:
		<p>PUBLIC GUARDIAN is petitioner and requests appointment as Conservator of the person with medical consent powers.</p> <p>Please see Petition for details.</p> <p>Court Investigator Report filed on 3/23/15.</p>	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
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<input type="checkbox"/>	FTB Notice		
			Reviewed on: 4/14/15
		Updates:	
		Recommendation:	
		File 17 - Cedillo	

Petition for Transfer

		<p>FRANKLIN and CHRISTINA MATA, parents, were appointed conservators in Los Angeles County on 4/17/2001.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>If the Petition is granted a Status Hearing will be set for the filing of the Receipt of Transfer on June 17, 2015 at 9:00 a.m. in Dept. 303.</p>	
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<input type="checkbox"/>	Aff.Sub.Wit.			
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<input type="checkbox"/>	Sp.Ntc.	<p>Court Investigator JENNIFER DANIEL filed a Petition for Transfer on 3/3/15 requesting this proceeding be transferred to Orange County because the conservatee has resided there for over 18 months, and it is presumed pursuant to Probate Code §2215 that transfer of the conservatorship case to the county of residence is in the best interests of the conservatee.</p> <p>Court Investigator further recommends that the fees and costs related to this transfer be waived.</p>		
<input type="checkbox"/>	Pers.Serv.			
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<input type="checkbox"/>	Aff. Posting	<p>Reviewed by: KT</p> <p>Reviewed on: 4/14/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 18 – Mata</p>		
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

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

DOD: 01/23/2015		<p>WANDA JONES, daughter/named executor without bond, is petitioner.</p> <p>Full IAEA – o.k.</p> <p>Will dated: 03/28/2006</p> <p>Residence: Selma Publication: The Selma Enterprise</p> <p>Estimated value of the Estate: Real property - \$200,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Thursday, 08/13/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 06/16/2016 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>
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<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: LV</p> <p>Reviewed on: 04/14/2015</p> <p>Updates:</p> <p>Recommendation: Submitted</p> <p>File 20 – Dobson</p>	

Motion for Specific Factual Findings Regarding "Special Immigrant Juvenile" Status

		<p>JOCELYN LISSETH CASTILLO VALLE, minor, is petitioner.</p> <p>Please see petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
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<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
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<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 4/14/15	
			Updates:	
			Recommendation:	
			File 21B - Valle	

24 Virginia Esparza (Estate)

Case No. 13CEPR00398

Atty Wishon, A. Emory (for Executor Diane Esparza)
Atty Roberts, Gregory J. (for Objector Ray A. Esparza)

Regarding Proposed Order Approving First and Final Account and Report of the Status of Administration and Petition for Settlement Thereof; For Allowance of Statutory Attorneys' Compensation and for Final Distribution

DOD: 3/2/13		DIANE ESPARZA , Daughter and Executor with Limited IAEA without bond, filed her Amended First and Final Account on 8/21/14. The petition requested statutory fees of \$6,252.84 to Petitioner and her attorney, reimbursement of \$13,686.21 to Petitioner for expenses (less \$10,400.00 for rent) , and distribution of the estate to Diane Esparza and Ray Esparza as trustees of the Ray P. and Virgie Esparza Trust.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>
Cont. from 040915			
Aff.Sub.Wit.			
Verified	x		
Inventory			
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Not.Cred.			
Notice of Hrg	x	RAY ESPARZA , Son, filed his Objection on 9/23/14.	
Aff.Mail	x	Dispute Resolution Agreement attached to Declaration of A. Emory Wishon, III, in Support of Dispute Resolution Agreement filed 2/5/15 included a list of specific assets and liabilities, withdrawal of the objection, and attorney fees to Objector's attorney of \$6,370.00 plus costs of \$1,032.00.	
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen		Minute Order 2/10/15 states: The matter is approved subject to filing of a receipt for the \$10,400.00 owed for rent, and with the objector's attorney's fees at \$6,252.84 plus costs of \$1,032.00. Mr. Wishon to submit a revised order. Petition granted, order to be signed ex parte.	
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report		On 2/23/15 , Mr. Wishon submitted a revised proposed order, along with a declaration, that provides revised schedules, fee calculations, and distribution.	
9202			
<input checked="" type="checkbox"/> Order		Because the proposed order did not correspond to the petition that was granted on 2/10/15 or the Court's minute order, the Court re-set the matter for hearing, with Petitioner responsible for serving notice on all parties entitled thereto.	
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice		See Page 2 for a comparison of the petition and the revised schedules attached to the declaration.	
			Reviewed by: skc
			Reviewed on: 4-14-15
			Updates:
			Recommendation:
			File 24 – Esparza

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Amended Petition filed 8-21-14:**Accounting: \$175,094.62****Beginning POH: \$164,061.64****Ending POH: \$175,105.87** (\$54,505.87 cash plus real property, personal property, and *rent due* from Executor Diane Esparza of \$10,400.00)**Executor (Statutory): \$6,252.84** (includes the \$10,400 *rent due* as a "receipt" for calculation)**Attorney (Statutory): \$6,252.84****Reimbursement to Petitioner: \$13,868.21, less \$10,400.00 owed in rent, balance due of \$3,468.21.****Distribution pursuant to Decedent's will:** Diane Esparza and Ray A. Esparza, as trustees of the Ray P. and Virgie Esparza Trust dated 11-1-96: \$159,059.08 (not broken down).**Declaration of A. Emory Wishon, III, filed 2-23-15, and Proposed Order provide as follows:****Accounting: \$189,006.92****Beginning POH: \$177,973.94****Ending POH: \$188,995.67** (\$78,795.67 cash plus the residence valued at \$110,000.00 and personal property valued at \$200.00) (Schedule A indicates \$10,400.00 in rent was paid 2-10-15.)**Executor (Statutory): \$6,670.21** (increased based on above revised schedules, which includes cash not previously inventoried, and the \$10,400.00 *rent now paid* as a receipt)**Attorney Wishon (Statutory): \$6,670.21 plus costs of \$1,439.45.**Note: Costs were not previously requested and do not appear to be itemized in the petition or declaration pursuant to Local Rule 7.17.**Attorney Roberts: \$6,370.00 plus costs of \$1,032.00**Note: Minute Order 2-10-15 authorizes \$6,252.84, which corresponded to the previous statutory compensation) plus costs of \$1,032.00. Declaration filed 2-23-15 states that because the amount originally requested, \$6,370.00, is actually less than the new statutory figure, that is the figure that should be authorized.**Reimbursement to Petitioner: \$11,631.38****Distribution: Real property only.** Note: cash and personal property are not mentioned. Order includes two parcels, where only one was inventoried.**SEE ADDITIONAL PAGES**

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NEEDS/PROBLEMS/COMMENTS:

1. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to the Court's order of 3-2-15 and Probate Code §1220 on Ray Esparza, Attorney Gregory J. Roberts, and Mandy Esparza.
2. On 2-10-15, the Court granted the petition, subject to receipt of the \$10,400.00 owed, and authorized attorney fees and costs to the Objector's attorney in the same amount as the statutory fees that were authorized to Petitioner and her attorney.

However, the proposed order was submitted with revised schedules that now include a previously disputed account, which result in an increase of the statutory fee calculation for Petitioner and her attorney.

- a. The declaration and revised schedules are not verified by the fiduciary Executor.
- b. It does not appear that this increase was contemplated by either the agreement or the Court when granting the petition. Need clarification.

Note: The proposed attorney fees to Objector's attorney were also increased further than what was authorized, but only to the amount noted in the agreement.

3. The proposed order now includes costs of \$1,439.45 to Petitioner's attorney, which were not previously requested, and have not been itemized for review pursuant to Local Rule 7.17. Need itemization.
4. The proposed order also appears to include a parcel of real property that was not included in the I&A. I&A Partial No. 1 filed 1-3-14 includes the residence, APN 436-113-14, without any legal description. The proposed order includes distribution of the residence, APN 436-113-14, as "Parcel One" plus "Parcel Two" APN 436-113-23. Need clarification: Was Parcel Two included in the Probate Referee's appraisal value OF \$110,000.00?
5. The proposed order does not include the dollar amount for distribution in addition to the real property pursuant to Local Rule 7.6.1.A.