



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.

**Second Account & Report of Trustee of the 2009 Sandy Moua Special Needs Trust;
 Petition to Settle Account; to Confirm Trustee Fees, and to Fix & Allow Attorney
 Fees [Prob. C. 1060]**

Age	WELLS FARGO BANK , trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 01/01/11 – 11/30/12	
Cont. from	Accounting - \$2,271,578.44	
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$2,066,918.55	
<input checked="" type="checkbox"/> Verified	Ending POH - \$2,046,096.74	
<input type="checkbox"/> Inventory	Trustee - \$55,385.04 (1.50% of the market value on the first two million and 1.05% on the next million, already paid to the Trustee pursuant to permission granted in the last accounting)	
<input type="checkbox"/> PTC	Attorney - \$1,595.00 (\$1,160.00 in attorney's fees and \$435.00 for filing fee)	
<input type="checkbox"/> Not.Cred.	Petitioner prays for an Order:	
<input checked="" type="checkbox"/> Notice of Hrg	1. Approving, allowing, and settling the second account and report of trustee;	
<input checked="" type="checkbox"/> Aff.Mail w/	2. Confirming the payment of the trustee fees paid during the accounting period; and	
<input type="checkbox"/> Aff.Pub.	3. Authorizing the attorney's fees to Myers Urbatsch P.C.	
<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: JF	
	Reviewed on: 04/15/13	
	Updates:	
	Recommendation:	
	File 1 - Moua	

Age: 85 years DOB: 1/22/28	<p>NANCY LEVAN, Petitioner, was Court appointed to represent the Conservatee on 12/08/10.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
	<p>TIMOTHY MOORE, son, was appointed Conservator of the Person on 02/17/11.</p>	
	<p>PUBLIC GUARDIAN was appointed Conservator of the Estate on 03/29/11.</p>	
Cont. from	<p>Petitioner states that on October 10, 2011, the Conservator filed a petition for reimbursement for deposits made and costs incurred because of his misunderstanding of the contents of the order appointing him which required him to get Court approval before he moved the Conservatee from Sunrise. The Conservator then filed an amended petition no only asking for reimbursement, but also to remove Petitioner as Court appointed counsel for the Conservatee. Because the Petitioner took the actions of sending out a change of address, hiring another attorney, and making a deposit with a care facility without consulting his attorney, Petitioner opposed the requested reimbursement. A settlement conference was held that resulted in the Conservator receiving the requested reimbursement and that Petitioner was to remain as the Court appointed counsel for the Conservatee.</p> <p>Petitioner asks that she be paid from the conservatorship estate for 18.45 hours @ \$200/hr., plus a filing fee of \$435.00 for a total fee request of \$3,985.00.</p> <p>Services are itemized by date and include review of documents, preparation of documents, attendance at hearings and settlement conference, and telephone conferences with family of Conservatee.</p>	
<input type="checkbox"/> Aff.Sub.Wit.		
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<input type="checkbox"/> Aff.Pub.		
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<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: 04/15/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2 – Dunn</p>

Petition to Combine Trust [Prob. C. 15411 & 17200(b)(14)]

	WILLIAM A. DYCK , trustee and current income beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
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<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	<p>Michael Blankenship, CPA, was appointed as Guardian Ad Litem for Ashlyn Paige Dyck and all other unborn and unascertained beneficiaries of the William A. Dyck 2008 Irrevocable Trust and the W. Dyck Irrevocable Trust on 02/28/13.</p> <p>Petitioner states:</p> <ol style="list-style-type: none"> 1. He is the current income beneficiary of the WILLIAM A. DYCK 2008 IRREVOCABLE TRUST, created by Velma H. Dyck, as settlor on 12/30/08 (the "William A. Dyck Trust"). He is also the current income beneficiary of the W. DYCK IRREVOCABLE TRUST, created by Velma H. Dyck, as settlor, on 12/30/08 (the "W. Dyck Trust"), (collectively "Trusts"). 2. Petitioner is the current acting trustee of each of the Trusts and has the authority under Section 6.1 (a) of each of the Trusts to appoint successor trustees. No successor trustees are currently designated for either trust. 3. The withdrawal beneficiaries pursuant to Section 4.1 of each of the Trusts are identical. 4. During Petitioner's lifetime, the distributions of income and principal to William A. Dyck pursuant to Section 5.1 of each of the Trusts are identical. 5. The Trusts provide identical testamentary powers of appointment over the assets to William A. Dyck and if William A. Dyck fails to exercise such powers of appointment, the assets of the Trusts are to be held, administered and distributed according to identical trusts for the surviving issue of William A. Dyck and if there are no such issue, then to the surviving issue of Velma H. Dyck. William A. Dyck is Velma H. Dyck's only child. 6. The only difference in the Trusts is that the William A. Dyck Trust was initially structured as a defective grantor trust for income tax purposes, whereas the W. Dyck Irrevocable Trust was not. <p style="text-align: center;">Continued on Page 2</p>	<p>Reviewed by: JF</p> <p>Reviewed on: 04/15/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4 - Dyck</p>

7. As of 01/01/13, the grantor trust treatment of the William A. Dyck Trust has been terminated.
8. Because the William A. Dyck Trust is no longer a defective grantor trust, the two separate trusts are no longer necessary.
9. The terms of the Trusts are substantially similar.
10. Petitioner's administrative duties would be simplified, and therefore less costly, if the Trusts were combined into a single trust, to be called the "W. Dyck Irrevocable Trust."
11. Combining the Trusts would not impair the accomplishment of the trust purposes or the interests of the trust beneficiaries.

Petitioner prays for an Order that:

1. William A. Dyck, the Trustee of the Trusts, be instructed to combine the William A. Dyck Trust and the W. Dyck Trust into a single trust, to be called the "W. Dyck Irrevocable Trust." The property of the newly combined W. Dyck Irrevocable Trust shall be held, administered, and distributed in accordance with the terms of the trust instrument creating the W. Dyck Irrevocable Trust dated 12/30/08

Consent of Guardian Ad Litem to Proposed Combination of Trusts, consenting to the combining of the Trusts, was filed 02/27/13.