



## 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) Report of Administration of Administrator and Petition for Settlement thereof and (2) Allowance of Statutory Compensation for Administrator and Statutory and Extraordinary Attorney Fees and (3) for Final Distribution**

<b>DOD: 09/23/01</b>		<b>WAYNE BARRETT</b> , Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			<b>CONTINUED FROM 04/07/14</b>
<b>Cont. from 021014, 040714</b>		Account period – <b>No Accounting provided</b>	As of 04/30/14, need amended Petition addressing the following:
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	I &A - <b>none filed</b>	1. Inventory & Appraisal filed 04/07/14 states that the estate has no assets. The Petition refers to assets consisting of personal property stored within two storage sheds and \$11,825.48. Need Clarification.
<input checked="" type="checkbox"/>	<b>Verified</b>	POH -	2. The Petition does not include an accounting or statement that an accounting has been waived by the beneficiaries. Need accounting or waivers of account from Michael Barrett and Rodger Barrett.
	<b>Inventory</b>	<b>\$11,825.48??</b>	3. The Petition requests statutory fees based on a fee base of \$11,825.48; however, the Petition does not sufficiently describe the property on hand, contain an accounting, and the inventory & appraisal filed 04/07/14 shows the value of the estate is zero. Therefore the statutory fee appears to be zero based on a no asset estate.
	<b>PTC</b>	Attorney (statutory) - <b>\$473.02</b>	4. The petition is inconsistent regarding the request for fees. Item 3 of the prayer requests \$8,763.02 as the total fees and costs to be reimbursed to the attorney, while item 5 of the prayer asks for a statutory fee of \$473.02. Based on the Inventory & Appraisal filed 04/07/14, it does not appear that the attorney would be entitled to any statutory fee. The fee request in the Petition is inconsistent, need clarification. The proposed distribution also does not appear to be accurate taking into account the requested fees and costs.
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>	Attorney x/o - <b>\$4,763.50</b>	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	(67.5 hours \$150.00/hr. expended by attorney investigating fraudulent transfer of real property by Mary Frost; taking depositions, preparing for and participating in a two day trial; attorney has agreed to this 50% reduction of the total fee)	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	<b>Costs - \$3,999.50</b>	
	<b>Aff.Pub.</b>	(for payment of arrears on storage facility holding personal property assets of the estate, filing fees, publication, certified copies, handwriting expert fees)	
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>	06/10/03	
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>	n/a	
<input checked="" type="checkbox"/>	<b>Order</b>	<b>Distribution, pursuant intestate succession and subject to creditor's claim as follows:</b>	
	<b>Aff. Posting</b>	Franchise Tax Board - \$844.02 (Creditor's Claim)	<b>Reviewed by:</b> JF
	<b>Status Rpt</b>		<b>Reviewed on:</b> 04/30/14
	<b>UCCJEA</b>		<b>Updates:</b>
	<b>Citation</b>	Rodger Barrett - \$655.21, plus ½ of the personal property (previously held in storage?) Michael Barrett - \$655.21, plus ½ of the personal property (previously held in storage?)	<b>Recommendation:</b>
	<b>FTB Notice</b>	n/a	<b>File 1 – Barrett</b>

Atty Horton, Lisa (for Petitioner Ellen Stoneburg)

Petition for Appointment of a Trustee for the Kenneth Jeffrey Foster Subtrust and to Terminate the Kenneth Eugene and Claire Ellen Foster 2004 Trust (Probate Code 17200(b) (10) & 15408)

	<b>ELLEN STONEBURG</b> , beneficiary, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	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"/> <b>Order</b>		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> <b>FTB Notice</b>	<p>Petitioner states on 5/10/07 <b>Bruce Bickel</b> was appointed as successor Trustee of the <b>Kenneth and Claire Foster 2004 Trust</b> by Court order. At all times since then <b>Bruce Bickel</b> has been and is now the duly qualified Successor Trustee.</p> <p>Article 8 of the Trust indicates <b>Ellen Stoneburg</b> is to receive 1/3<sup>rd</sup> of the trust estate, <b>Dennis E. Foster</b> is to receive 1/3<sup>rd</sup> of the trust estate, and that separate subtrusts are to be established for the benefit of <b>Neil Foster</b> and <b>Kenneth Jeffrey Foster</b> with each subtrust receiving a 1/6<sup>th</sup> interest.</p> <p>In order to finalize and close the 2004 Trust estate a Trustee must be appointed to take and hold the funds for the benefit of <b>Kenneth Jeffery Foster</b>, approve the second and final accounting and consent to terminate the 2004 Trust.</p> <p>Petitioner was the previous acting Trustee of the 2004 Trust before it was amended by Kenneth Foster in 2007, substituting Bruce Bickel in as Trustee. The 2004 Trust nominated <b>Jeff Ceroni</b> and <b>Bruce Bickel</b> as Co-Trustee of the subtrust for <b>Kenneth Jeffrey Foster</b>. <b>Jeff Ceroni</b> cannot be located and <b>Bruce Bickel</b> declines to serve as trustee of the subtrust.</p> <p>Petitioner requests that she be appointed as Trustee of the <b>Kenneth Jeffrey Foster subtrust</b> to serve without the requirement of a bond as none was previously required for her under the 2004 Trust and the annual bond premium would be an unnecessary burden and expense on the subtrust.</p> <p style="text-align: center;"><b>Please see additional page</b></p>	
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 4/30/14</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 3 – Foster</b>

Petitioner states it is in the best interest of the trust and the beneficiaries that the 2004 Trust be terminated once a Trustee is appointed for the Kenneth Jeffrey Foster Subtrust, as all other beneficiaries have received their complete distribution under the trust.

Wherefore, petitioner requests this court to order that:

1. The court appoint **Ellen Stoneburg** as Trustee of the **Kenneth Jeffrey Foster Subtrust to the Kenneth Eugene Foster and Claire Ellen Foster 2004 Trust**, to serve without bond.
2. The court authorize and direct **Bruce Bickel**, Trustee of the **Kenneth Eugene Foster and Claire Ellen Foster 2004 Trust** to distribute to **Ellen Stoneburg**, as Trustee of the **Kenneth Jeffrey Foster Subtrust to the Kenneth Eugene Foster and Claire Ellen Foster 2004 Trust**, **Kenneth Jeffrey Foster's** share of the 2004 Trust;
3. The Court Terminate the **Kenneth Eugene Foster and Claire Ellen Foster 2004** Trust;
4. All the acts of Trustee, Bruce Bickel be confirmed and approved.
5. The Court discharge Bruce Bickel as Trustee of the **Kenneth Eugene Foster and Claire Ellen Foster 2004 Trust** and his fiduciary bond be released.

**Declaration of Trustee Bruce Bickel filed on 3/17/14** states he has read the petition and is in agreement that the Trust terminate and that he be discharged as Trustee of said trust. There is no longer any need for the trust to remain open as all but one of the beneficiaries have received their complete distribution under the trust and have consented to the termination of the trust and approved the second and final accounting. After the court appoints a trustee for the Kenneth Jeffery Foster Subtrust, that Trustee can accept his distributive share and approve the second and final accounting. Mr. Bickel declines to be the trustee for the Kenneth Jeffrey Foster Subtrust.

**Amended Trust Accounting for 2007, 2008, 2009, 2010, 2011, 2012 and Partial Accounting 2013**

<b>DOD: 06/22/07</b>	<p><b>LARRY A. DONALDSON</b>, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>The Court accepted Mr. Donaldson's withdrawal as executor on 7/26/1 and appointed the Public Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>CONTINUED FROM 04/07/14</u></b></p> <p>1. The accounting does not comply with the Probate Code, specifically the format for accountings outlined in Probate Code §1060. In addition the accounting appears to be for the Paul Harvey Wallace Trust. The Paul Harvey Wallace Trust is not before the court. Mr. Donaldson needs to file an accounting for the Estate of Paul Harvey Wallace.</p>	
<b>Cont. from 040714</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<p><b>Reviewed by:</b> JF</p>
			<p><b>Reviewed on:</b> 04/30/14</p>
	<p><b>Updates:</b></p>		
	<p><b>Recommendation:</b></p>		
	<p><b>File 4A – Wallace</b></p>		

**Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$600.00**

<b>DOD: 06/22/07</b>	<p><b>LARRY A. DONALDSON</b>, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>CONTINUED FROM 04/17/14</u></b></p>
	<p>On 07/26/13, <b>LARRY DONALDSON</b> resigned as Executor and the <b>PUBLIC ADMINISTRATOR</b>, was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p>	
<p><b>Cont. from 010214, 013014, 022014, 041714</b></p>		
<b>Aff.Sub.Wit.</b>	<p><b>Minute order from 12/05/13 set this matter for an Order to Show Cause and states:</b> The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.</p>	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> JF</p>	
	<p><b>Reviewed on:</b> 04/30/14</p>	
	<p><b>Updates:</b></p>	
	<p><b>Recommendation:</b></p>	
	<p><b>File 4B – Wallace</b></p>	

**Order to Show Cause Re: Failure to Provide Information to the Successor Administrator Timely; Imposition of Sanctions in the Amount of \$800.00**

<b>DOD: 06/22/07</b>	<p><b>LARRY A. DONALDSON</b>, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>On 07/26/13, <b>LARRY DONALDSON</b> resigned as Executor and the <b>PUBLIC ADMINISTRATOR</b>, was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p> <p><b>Minute order from 12/05/13 set this matter for an Order to Show Cause and states:</b> The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u><b>CONTINUED FROM 04/17/14</b></u></p>
<b>Cont. from 010214, 013014, 022014</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: JF</b>
		<b>Reviewed on: 04/30/14</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 4C – Wallace</b>

**Probate Status Hearing Re: Failure to File First Account or Petition for Final Distribution**

<b>DOD: 06/22/07</b>	<b>LARRY A. DONALDSON</b> , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>CONTINUED FROM 04/17/14</b>
<b>Cont. from</b>	<b>Notice of Status Hearing</b> filed 11/28/12 set this matter for status. Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Larry A. Donaldson on 10/19/12.	<b>Note:</b> Minute order from 07/26/13 states: Mr. Donaldson advises the Court that he filed a status statement yesterday. He further advises that the accounting is being done however he may have a conflict which may require another attorney to complete the work in this matter. The Court on its own motion accepts Mr. Donaldson's withdrawal as Executor in this matter and appoints the Public Administrator. Mr. Donaldson is directed to contact Ms. Kruthers.
<b>Aff.Sub.Wit.</b>		<b>Note:</b> Letters of Administration were issued to the Public Administrator on 08/01/13.
<b>Verified</b>		<b>As of 10/01/13, the following remains outstanding:</b>
<b>Inventory</b>		1. Need <b>Final Inventory &amp; Appraisal.</b>
<b>PTC</b>		2. Need <b>Accounting and/or Petition for Final Distribution.</b>
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Declaration of Beneficiary Laura Leonard re Probate Status Hearing – Failure to File First Account or Petition for Final Distribution filed 01/13/11</b> states: she and her brother (both beneficiaries of the estate) have made many written and verbal requests to Mr. Donaldson requesting an accounting and for their father's estate be brought to a close. Ms. Leonard states that Mr. Donaldson has ignored their requests and repeatedly failed to communicate with them regarding the estate. Ms. Leonard and her brother had an attorney, Frederick Borges, contact Mr. Donaldson on their behalf to request that he move forward with the estate. Mr. Donaldson responded that he would move forward, but has failed to do so. Ms. Leonard states that she and her brother have also made a complaint to the state bar of California regarding Mr. Donaldson's failure to act. Ms. Leonard states that after all of these efforts, Mr. Donaldson recently provided them with a sloppy, incomplete "accounting", however several years' worth of information is absent and many of the transactions are questionable. Declarant further states that she and her brother were supposed to receive a distribution in early January, but have not received anything.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		<b>Reviewed by:</b> JF
<b>Status Rpt</b>		<b>Reviewed on:</b> 04/30/14
<b>UCCJEA</b>		<b>Updates:</b>
<b>Citation</b>		<b>Recommendation:</b>
<b>FTB Notice</b>	<b>Inventory &amp; Appraisal, partial no. 1 filed 07/24/13</b> - \$1,619,273.76	<b>File 4D – Wallace</b>
	<b>Clerk's Certificate of Mailing filed 10/08/13</b> states that a copy of the Minute Order from 10/04/13 was mailed to Larry Donaldson on 10/08/13.	
	Continued on Page 2	

**Report Regarding Status of Estate filed 11/27/13** states: At a hearing on 07/26/13, the Court accepted Larry Donaldson's resignation as Administrator and appointed the Public Administrator. According to the 07/26/13 minute order, Mr. Donaldson advised that the accounting was being done, however a conflict that may require another attorney to complete the work has come up. No accounting has been filed. Mr. Donaldson was not returning calls to the Public Administrator, who called him weekly on Wednesdays. He finally answered a call made from a personal cell phone. At a hearing on 10/04/13, Judge Hamilton ordered Mr. Donaldson to be present at the continued hearing on 10/25/13. Mr. Donaldson did not appear on 10/25/13. The Public Administrator advised the Court that all estate assets had been liquidated and rolled into a trust, of which Mr. Donaldson is the trustee. Despite requests by the Public Administrator, a copy of the trust has not been provided. The Public Administrator is concerned about the assets considering they have not yet been accounted for in the estate.

According to the Inventory & Appraisal filed by Mr. Donaldson on 06/24/13, the estate's value was \$1,619,273.76. The Public Administrator has not been able to access the Bank of America or Security First Bank accounts. He filed and was granted an ex parte order directing financial institutions to provide access to and information regarding all accounts held by the estate or trust of the decedent. The Public Administrator has made several attempts to locate a company whereby "Person Education Publication Royalties" are paid. According to attachment 2 to the Inventory & Appraisal, future royalties will be paid to the estate. There are two timeshares listed, and the Public Administrator has asked Chicago Title to determine the status of these properties. The real property, valued at \$750,000.00 was reportedly sold for \$600,000 and the proceeds placed into a Bank of America bank account. The Public Administrator believes that Mr. Donaldson should once again be ordered to appear before this Court to account for all assets listed on the Inventory & Appraisal that he filed. He should also be ordered to provide a copy of the Trust and an accounting of those assets to the Public Administrator.

**Status Conference Statement** filed 01/17/14 by Larry Donaldson, former Executor, states:

1. He retained an accounting firm to prepare an accounting for the estate in August 2013.
2. The accounting firm has indicated that they believe the accounting can be completed by 01/28/14.
3. Several months ago, he provided the beneficiaries a bank ledger showing all income and expenditures for both the Bank of America and Security First Bank accounts pending the filing of an official accounting.
4. He has provided original estate documents to the accounting firm and therefore does not have personal possession of the documents in order to be able to prepare an accounting himself.
5. He requests a short continuance to allow him to file an accounting, he believes he should be able to have it filed on or before 01/31/14.

<b>DOD: 3-8-06</b>	<b>ARACELI SOTO GOMEZ</b> Executor with full IAEA without bond, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Continued from 12-10-13, 1-28-14, 3-2-14</p> <p>Minute orders reflect continuance, but no other information is noted.</p> <p>As of 4-30-14, nothing further has been filed. The following issue remains:</p> <p>1. According to Attorney Cross' status report filed 12-12-12, it was learned that there was a title issue stemming from Decedent's divorce in 1983 wherein the Decedent was awarded the residence, but the judgment did not contain the complete legal description of the property, so the assessor had no record of transfer to her alone. Attorney Cross anticipated filing an application to the Family Court in the old dissolution case 0274152-8 to modify the judgment or sign a deed conveying the property.</p> <p>In this petition, Petitioner states the correction is expected to be completed before the hearing (on 10-10-13); however, Court records do not reflect any activity in that case (0274152-8).</p> <p>Was the title issue corrected? Is the estate is in a position to close? Need clarification.</p>
	Accounting is waived.	
<b>Cont. from 121013, 012814, 030214</b>	I&A: \$68,035.00 POH: \$68,035.00	
<b>Aff.Sub.Wit.</b>	(Decedent's one-third interest in real property plus personal property)	
<input checked="" type="checkbox"/> <b>Verified</b>	Executor (Statutory): Waived	
<input checked="" type="checkbox"/> <b>Inventory</b>	Attorney (Statutory): Waived	
<input checked="" type="checkbox"/> <b>PTC</b>	Costs: \$1,090.00 (to be paid by Executor outside of probate estate)	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	<b>Distribution pursuant to Decedent's will:</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Araceli Soto Gomez: \$67,285 (Decedent's one-third interest in real property plus personal property)	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<input checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
	<b>Reviewed by:</b> skc	
	<b>Reviewed on:</b> 4-30-14	
	<b>Updates:</b>	
	<b>Recommendation:</b>	
	<b>File 2 – Soto</b>	

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

<b>DOD: 09/06/2013</b>	<b>MARY JANE SUNAMOTO,</b> niece/named executor without bond is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Confidential Supplement to Duties &amp; Liabilities of Personal Representative.</p> <p><b>Note: If the petition is granted status hearings will be set as follows:</b></p> <ul style="list-style-type: none"> <li>• <b>Monday, 10/09/2014 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u></li> <li>• <b>Monday, 07/06/2015 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <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.	
<b>Cont. from</b>	Will dated: 03/24/2007	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	s/p	
<input checked="" type="checkbox"/> <b>Verified</b>	Residence: Reedley Publication: The Reedley Exponent	
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	<b>Estimated value of the Estate:</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Personal Property - \$265,719.60	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	Probate Referee: Steven Diebert	
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input checked="" type="checkbox"/> <b>Letters</b>		
<input checked="" type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 04/30/2014
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 7 - Luna</b>

<b>DOD: 12/13/2013</b>	<b>KATIE PERRY</b> and <b>STELLA LOPEZ</b> , siblings are petitioners and request appointment as Administrators without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: If the petition is granted status hearings will be set as follows:</b>  <ul style="list-style-type: none"> <li>• <b>Monday, 10/09/2014 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <b>and</b></li> <li>• <b>Monday, 07/06/2015 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> <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>
<b>Cont. from</b>	All heirs nominate petitioners and waive bond	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	Full IAEA – o.k.	
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>	Decedent died intestate	
<input type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Residence: Fresno Publication: The Business Journal	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	w/	
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>	<b>Estimated value of the Estate:</b> Personal property - \$185,660.00 Real property - \$24,000.00 <b>Total - \$209,660.00</b>	
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>	Probate Referee: Steven Diebert	
<input checked="" type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 04/30/2014
		<b>Updates:</b>
		<b>Recommendation:</b> Submitted
		<b>File 8 - Maldonado</b>

<b>DOD: 10/22/10</b>	<p><b>LEANNE WALKER GRANT</b>, niece, was appointed Administrator with bond fixed at \$7,000,000.00 on 03/12/12. Letters of Administration were issued on 05/16/12.</p> <p><b>First Report of Personal Representative and Petition for its Settlement; Petition to Determine Entitlement to Estate Distribution and to Allow Administration of Estate to Continue</b> filed 06/13/13 and approved on 07/15/13.</p> <p><b>Minute Order from 07/15/13</b> set this matter status regarding preliminary distribution on 11/05/13.</p> <p><b>Inventory &amp; Appraisal, partial No. 1</b> filed 09/20/13 - \$202,328.21</p> <p><b>Inventory &amp; Appraisal, partial No. 2/Final</b> filed 09/20/13 - \$6,763,876.49</p> <p><b>Status Report of Personal Representative filed 01/31/14</b> states: The administration of this estate is complicated by a number of factors, as more fully set forth in the First Report of Personal Representative and Petition for its Settlement, etc. filed 06/28/13. The Court entered it order regarding that Petition on 07/15/13 and, among other things, determined the persons who are the heirs of the decedent, and ordered that the administration continue until the estate is in a condition to be closed. The Administrator intends to file a petition for significant distribution as soon as possible. A continuance of 90 days is requested.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>CONTINUED FROM 02/03/14</b> <b>As of 04/30/14, nothing further has been filed in this matter.</b>	
<b>Cont. from 110513, 020314</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 04/30/14	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 10 – Lowery</b>	

Atty Kruthers, Heather H., of County Counsel's Office (for Public Administrator, Successor Trustee)

## Status Hearing

DOD: 3/12/2010	<b>JOHN R. PANZAK, JR.</b> , son, served as Trustee of the <b>JOHN ROBERT PANZAK LIVING TRUST</b> dated <b>11/27/2000</b> since the Decedent's death in March 2010.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Cont. from 070813, 080513, 100713, 110613, 010814, 022014, 040314	Beneficiaries of the Decedent's Will are John R. Panzak, Jr., Gordon Panzak, and the <b>JOHN ROBERT PANZAK LIVING TRUST</b> ; beneficiaries of the <b>JOHN ROBERT PANZAK LIVING TRUST</b> are John R. Panzak, Jr., and Gordon Panzak.	<u><b>Continued from 4/3/2014.</b></u> Minute Order states the Court notes that Mr. Shekoyan is unavailable today due to surgery. Matter continued to 5/5/2014.
Aff.Sub.Wit.	<b>Petition for Appointment of Successor Trustee</b> was filed 3/11/2013 by <b>SHARON PANZAK</b> , spouse, stating the Successor Trustee, <b>JOHN R. PANZAK, JR.</b> , died on 2/15/2013, and requesting she be appointed successor trustee.	<u><b>Notes:</b></u>
Verified	<b>Objections to and Opposition to Sharon Panzak's Petition for Appointment of Successor Trustee</b> was filed 4/24/2013 by <b>GORDON PANZAK</b> , claiming the position of successor trustee vested in him no later than 3/18/2013 as the second named successor trustee of the Trust.	<ul style="list-style-type: none"> <li>Estate of John R. Panzak, Sr., Case #10CEPR00505, is a related matter in which the Public Administrator was appointed Administrator of the Estate by Minute Order dated 4/29/2013.</li> <li>Order Settling First and Final Account and Report of Deceased Personal Representative was filed on 3/13/2014 in the John R. Panzak, Sr. Estate.</li> </ul>
Inventory	<b>Minute Order dated 4/29/2013</b> from the hearing on Sharon Panzak's petition for appointment of successor trustee states: "The petition is denied as to Sharon Panzak and the Court appoints the <b>PUBLIC ADMINISTRATOR</b> as successor trustee. Matter is set on 7/8/2013 for Status Hearing."	<b>Reviewed by:</b> LEG
PTC	<b>Order Appointing Public Administrator as Successor Trustee</b> was filed 5/22/2013.	<b>Reviewed on:</b> 4/30/14
Not.Cred.	<b>Minute Orders dated 7/8/2013, 8/5/2013, 10/7/2013, and 11/6/2013</b> state only continuation dates of the Status Hearing, ending with the 1/8/2014 continuance.	<b>Updates:</b>
Notice of Hrg		<b>Recommendation:</b>
Aff.Mail		<b>File 12 – Panzak</b>
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		