



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.

Age: 66 years	PUBLIC GUARDIAN , Conservator, is petitioner.	<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"> Wednesday, May 25, 2016 at 9:00 a.m. in Department 303, for the filing of the seventh account. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
	Account period: 5/30/12 – 3/11/14	
	Accounting - \$78,818.07	
Cont. from	Beginning POH - \$21,339.09	
<input type="checkbox"/> Aff.Sub.Wit.	Ending POH - \$19,294.51	
<input checked="" type="checkbox"/> Verified	Conservator - \$13,647.81 (90.77 Deputy hours @ \$96/hr and 64.92 Staff hours @ \$76/hr)	
Inventory	Attorney - \$1,250.00 (per less than allowed per Local Rule)	
PTC	Bond fee - \$246.84 (o.k.)	
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner prays for an Order:	
<input checked="" type="checkbox"/> Aff.Mail W/	1. Approving, allowing and settling the sixth account.	
Aff.Pub.	2. Authorizing the conservator and attorney fees and commissions	
Sp.Ntc.	3. Payment of the bond fee	
Pers.Serv.		
Conf. Screen	Court Investigator Jennifer Daniel's Report filed on 10/9/2013	
Letters		
Duties/Supp		
Objections		
Video Receipt		
<input checked="" type="checkbox"/> CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 6/23/14
		Updates:
		Recommendation:
		File 1 - Hutton

Atty Guerrero, Danielle R.; Flanigan, Philip M.; of Law Offices of Philip Flanigan (for Petitioner Philip M. Flanigan on behalf of James E. Washburn)

(1) First and Final Account and Report of Administrator Allowing for its Settlement and (2) for Discharge of Administrator of an Insolvent (Non-Asset) Estate

DOD: 11/29/2004		<p>PHILIP M. FLANIGAN, filing in the absence of Personal Representative JAMES E. WASHBURN, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> JAMES E. WASHBURN, spouse, filed a <i>Petition for Probate</i> on 8/5/2005, in response to a previous <i>Petition for Probate</i> filed by the Decedent's daughter; the first <i>Petition</i> was voluntarily dismissed; Following the issuance of <i>Letters Testamentary</i> on 10/17/2005 naming James Washburn as Personal Representative, Decedent's daughter and the Personal Representative entered into litigation to resolve a dispute over interpretation of a Trust provision; the matter was settled in mediation; No Inventory and Appraisal was filed because there were no assets to be appraised; At the time of Decedent's death, all assets in the estate were titled in the name of the JAMES E. WASHBURN, SR., and MARILYN D. WASHBURN REVOCABLE LIVING TRUST and were subsequently disposed of through the Trust; No property in the estate is subject to probate administration as the Trust contains all known assets; The Personal Representative is the acting Executor of the Estate and sole Trustee of the Trust; There are no funds to pay the advanced costs and expenses of administration for the legal costs associated with this estate; No compensation has been paid to the Personal Representative or Personal Representative's attorney; It is believed the Personal Representative performed all duties required of him as the Executor of the Decedent's estate except for the filing of the final petition; the estate is now in a condition to be closed; As the estate is now nearly 10 years old with no creditors and the Trust as its sole beneficiary, Petitioner believes that filing this <i>Petition</i> is the most efficient and appropriate manner in which to conclude this probate; Petitioner knows of no opposition to this <i>Petition</i>. <p>Petitioner prays for an Order of this Court that:</p> <ol style="list-style-type: none"> The administration of this estate be terminated as the estate is insolvent; All acts and proceedings of JAMES E. WASHBURN, as Personal Representative, be confirmed and approved; and JAMES E. WASHBURN, as Administrator of the estate, be discharged as there are no assets to administer or distribute in this matter. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 3B is a <i>Petition for Deferral of Filing Fee for Termination of Administration of an Insolvent (Non-Asset) Estate</i>.</p> <p>Note: Petitioner states he files this <i>Petition</i> in the absence of the Personal Representative, James E. Washburn, and does not state any efforts to contact the Personal Representative. Petitioner states it is believed the Personal Representative performed all duties required of him as the Executor of the Decedent's estate except for the filing of the final petition. <i>Verification</i> signed by Attorney Flanigan states the whereabouts of James E. Washburn are currently unknown.</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/ O
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			101705
<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			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 6/23/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3A - Washburn</p>		

Atty Guerrero, Danielle R.; Flanigan, Philip M.; of Law Offices of Philip Flanigan (for Petitioner Philip M. Flanigan on behalf of James E. Washburn)

Petition for Deferral of Filing Fee for Termination of Administration of an Insolvent (Non-Asset) Estate

DOD: 11/29/2004		<p>PHILIP M. FLANIGAN, filing in the absence of Personal Representative JAMES E. WASHBURN, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> • He petitions the Court for deferral of the applicable filing fee for the <i>First and Final Account and Report of Administrator, etc.</i>, based upon the following; • The sole purpose behind filing the <i>Petition for Probate</i> was to respond to the first <i>Petition for Probate</i> filed by the Decedent's daughter; • At the time of Decedent's death all assets in the estate were titled in the name of the JAMES E. WASHBURN, SR., and MARILYN D. WASHBURN REVOCABLE LIVING TRUST and were disposed of through the Trust; • At no time was any property of any kind in the estate subject to probate administration as the Trust contains all known assets; • The estate does not have, and has never had, any property or assets to pay advanced expenses of administration, attorney fees, creditor claims, or Court costs; • Therefore, Petitioner files this petition to defer the filing fee for the <i>First and Final Account and Report of Administrator, etc.</i>, to be paid to the Court if any assets subsequently come into the estate. <p>Petitioner prays for an Order of this Court that the filing fee for the <i>First and Final Account and Report of Administrator, etc.</i> be deferred until such time as any assets may subsequently come into the estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Filing fee was not paid to file this <i>Petition</i>. Filing fee of \$435.00 was paid on 5/16/2014 to file the <i>First and Final Account and Report of Administrator, etc.</i></p> <p>1. Need proposed order.</p>
Cont. from			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	W/O		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: LEG	
		Reviewed on: 6/23/14	
		Updates:	
		Recommendation:	
		File 3B - Washburn	

Jerry Campbell DOD: 8-4-00	KEVIN S. CAMPBELL , beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner states he is an income and principal beneficiary of The Jerry W. Campbell and Billie J. Campbell Irrevocable Trust dated March 28, 1991.	Continued from 4-9-14, 5-21-14
Cont from 040914, 052114	The trust is irrevocable.	Minute Order 5-21-14: Mr. Schorling with fill notice of hearing and declaration addressing Examiner Note issues. David Ash is ordered to be personally present at next hearing. The Court will send notice. Continued to 6-25-14.
<input type="checkbox"/> Aff.Sub.Wit.	Petitioner states DAVID E. ASH is the duly appointed and acting trustee.	
<input checked="" type="checkbox"/> Verified	Petitioner states the trustee has not made any report of information whatsoever concerning the trust for the period starting with commencement of the trust on 3-28-91 until 8-3-00.	
<input type="checkbox"/> Inventory	For the period 8-3-00 until 2-1-09, the trustee provided incomplete and handwritten information (see attached copies). All of this incomplete and handwritten information is written so sloppily that it is difficult or impossible to comprehend.	<u>SEE ADDITIONAL PAGES</u>
<input type="checkbox"/> PTC	Moreover, because no information has been provided concerning the trust from 3-28-91 through 8-3-00, there is no context for understanding what little incomplete information has been provided.	
<input type="checkbox"/> Not.Cred.	Petitioner states that on or about 7-1-13 Petitioner delivered by facsimile a written request for information pursuant to Probate Code §§ 16062 and 16063.	
<input checked="" type="checkbox"/> Notice of Hrg	To date, the trustee has failed and refused to prepare and provide Petitioner with the requested account.	
<input checked="" type="checkbox"/> Aff.Mail	Petitioner prays for an order:	
<input type="checkbox"/> Aff.Pub.	1) Compelling David E. Ash as trustee to prepare and file with this Court an account of the trust since its commencement on 3-28-91, including copies of any and all documents that support, substantiate, or evidence any item set forth in the accounting;	
<input type="checkbox"/> Sp.Ntc.	2) Instructing David E. Ash to petition this Court for the settlement of the account and give notice of the hearing on the petition;	Reviewed by: skc
<input type="checkbox"/> Pers.Serv.	3) For such attorney fees and costs as may be allowable by law; and	Reviewed on: 6-23-14
<input type="checkbox"/> Conf. Screen	4) For all other orders the Court deems proper.	Updates:
<input type="checkbox"/> Letters		Recommendation:
<input type="checkbox"/> Duties/Supp		File 11 – Campbell
<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		

Page 2

Note: Petitioner Kevin Campbell is a beneficiary. The petition states the other beneficiaries are:

- Randall D. Campbell (Deceased)
- Ricky D. Campbell (Deceased)
- Keith J. Campbell – address provided
- Jennifer D. Campbell (Deceased)
- Scottie W. Campbell – address provided

Notice of Hearing filed 3-13-14 indicates mailing to David Ash, Keith J. Campbell, and Scottie W. Campbell.

Examiner Notes requested clarification on the dates of death for the deceased beneficiaries per local rule, and Petitioner provided the following information:

Declaration filed 5-21-14 provides the following information:

- Trustor Jerry W. Campbell died 8-4-00
- Trustor Billie J. Campbell is still alive
- Deceased beneficiary Randall Campbell died 1-4-07
- Deceased beneficiary Ricky Campbell died 4-20-09
- Deceased beneficiary Jennifer Campbell died 5-21-09

Examiner Notes requested a complete list of all persons entitled to notice of this petition pursuant to Probate Code §17201.

Petitioner's Declaration filed 5-21-14 states: Trustor Billie J. Campbell is still alive. Beneficiary Randall Campbell died on 1-4-07 leaving only two issue: Petitioner and Petitioner's brother Keith. Beneficiary Ricky Campbell died 4-20-09 leaving two children: Scottie W. Campbell and Jennifer D. Campbell. Jennifer D. Campbell died 5-21-09 survived by a minor child (name not included). Neither Petitioner nor Keith have issue. Petitioner states does not have mailing addresses for the children of Scottie W. Campbell or Jennifer D. Campbell. He attempted to obtain them from Trustor Billie J. Campbell; however, she did not return his calls or letter. Petitioner states Notice of Hearing was mailed to Trustee David Ash via certified mail, as evidenced by the receipt attached.

Notice of Hearing filed 6-2-14 indicates mailing to David Ash (via certified mail, receipt signed by Linda Ash, not David Ash, but also via Civil Subpoena personally served), and to Keith J. Campbell, Scottie W. Campbell, and Billie J. Campbell via regular first class mail.

Examiner's Note: The declaration is not verified by the Petitioner, and although the declaration provides some family lineage, there is no statement providing the complete list of persons entitled to notice of this petition with addresses as requested and pursuant to §17201, and although, as previously noted, the trust appears to include spouses, no spouses are listed.

Therefore, a complete verified list of persons entitled to notice of this petition pursuant to §§ 17201, 17203 is still needed.

SEE ADDITIONAL PAGES

NEEDS/PROBLEMS/COMMENTS:

1. **The following item remains per above discussion:** Probate Code §17201 requires the petition to list all persons entitled to notice. Petitioner lists the other living beneficiaries; however, need clarification: Does this list include all persons entitled to notice pursuant to §17203?

For example, it appears that according to the terms of the trust, spouses and issue of beneficiaries may also be entitled to notice. Some of the beneficiaries are deceased. Is anyone else entitled to notice?

2. **The attached copy of the trust is blank at various pertinent sections, such as the amount initially transferred, the appointment of a trustee, the amount initially received by the trustee, and Schedule A. Need clarification: Is a complete copy of the trust available?**
3. **According to the terms of the trust, the trust was to be split into six separate trusts for each beneficiary upon the deaths of the trustors. However, Petitioner appears to be requesting accounting for the original trust since its inception through the present.**

The Court may require clarification regarding the requested account period and for which trusts.

4. **Examiner Notes previously stated:** Probate Code §17000(b)(7)(B) allows petition under this section if the trustee has failed to provide the requested information within 60 days after the beneficiary's **reasonable written request**.

Petitioner states he faxed a request to the trustee on or about July 1, 2013, and to date the trustee has failed and refused to prepare and provide the requested account.

However, the copy of the letter at Exhibit C does not indicate any fax number or designation (i.e., "sent via facsimile") or fax confirmation data on the page, and Petitioner also does not indicate whether the communication was followed up via regular or certified mail, or telephone call, or whether he was able to confirm receipt of the fax.

Further, the copies of the ledger information provided by the trustee appear to be dated as late as November 2013, which is after the date of the request. This indicates that the copies may have been provided in response to the request.

If so, need clarification as to whether reasonable written request was made after receipt of the ledgers in response to the letters, providing time for response pursuant to Probate Code §17000(b)(7)(B).

Declaration of Attorney Schorling filed 5-21-14 (not verified by the Petitioner) states that subsequent to the July 1, 2013 written request, Petitioner has had at least a half dozen conversations with David Ash, in person and by telephone, reiterating his request for an accounting.

5. **The proposed order includes his filing costs and attorney fees in the amount of \$1,500.00. The Court may require an itemized declaration regarding the fees from the attorney.**

DOD: 12/25/2011	HERBERT HERNANDEZ and RICHARD HERNANDEZ , were appointed Co-Administrators, with Limited IAEA authority, on 11/8/12.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 011014, 031114, 041514, 052014	The Court ordered \$50,000.00 into a blocked account.	Continued from 5/20/14.
Aff.Sub.Wit.	Receipt for Blocked Account (\$50,000.00) filed on 12/4/12.	
Verified		
Inventory	Final Inventory and Appraisal filed on 1/10/14 showing the estate valued at \$27,105.00	1. Need first account or petition for final distribution <u>or</u> 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.
PTC		
Not.Cred.		
Notice of Hrg	Supplemental Inventory and Appraisal no. 1 filed on 1/10/14 shows property valued at \$86,279.00	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Former Status Report of Gary Bagdasarian filed on 3/7/14 states a disagreement between the co-executors over the amounts of reimbursement to each of them has been resolved, and the parties are now putting together the Final Report and Account of Estate. A request is made for a continuance of 60 days (for May 14, 2014 or thereafter.)	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order	Former Status Report of Gary Bagdasarian filed on 5/19/14 states the final account and report has been completed, except for an issue of reimbursement to the Estate for rental on the property occupied by Co-Administrator Richard Hernandez and final distribution of the estate assets. Request is made for a continuance of 30 days in order that said issue may be resolved by the parties.	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

	<p>PAO CHANG, father, was appointed Guardian of the Estate on 3-4-13 with funds blocked. Letters issued 3-5-13.</p> <p>At the hearing on 3-4-13, the Court set this status hearing for the filing of the first account.</p> <p>Receipt and Acknowledgment of Order for the Deposit of Money into Blocked Account filed 5-24-13 shows \$6,378.58 was deposited into the blocked EECU account on 3-18-13.</p> <p>Inventory and Appraisal filed 7-12-13 by Mr. Chang, in pro per, indicates \$6,005.00.</p> <p>The first account is now due.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 5-16-14 Minute Order 5-16-14: No appearances. Matter continued to 6-25-14.</p> <p>A copy of the minute order was mailed to the Guardian on 5-16-14.</p> <p>1. Need first account or current written status report pursuant to Local Rule 7.5 which states 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.</p>
Cont from 050914		
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: 6-23-14
		Updates:
		Recommendation:
		File 25 - Cha