



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.

Status Hearing Re: Filing Receipt for Blocked Account

Olivia, age 13	STEPHANIE LASSLEY, Mother, is Guardian of the Estate.	NEEDS/PROBLEMS/COMMENTS:
	The Second Account was settled on 6-13-13.	1. Need receipt for blocked account (Form MC-356).
Aff.Sub.Wit.	Order 6-13-13, authorized Guardian to withdraw the balance remaining after payment of authorized compensation and expenses from a certain account and reinvest it into a Morgan Stanley blocked account.	
Verified		
Inventory	Order to Deposit Money Into Blocked Account indicates \$47,265.62 to be deposited to a blocked account.	
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: 7-9-13
		Updates:
		Recommendation:
		File 2 – Lassley

Graceson, age 15	<p>STEPHANIE LASSLEY, Mother, is Guardian of the Estate.</p> <p>The Second Account was settled on 6-13-13.</p> <p>Order 6-13-13, authorized Guardian to withdraw the balance remaining after payment of authorized compensation and expenses from a certain account and reinvest it into a Morgan Stanley blocked account.</p> <p>Order to Deposit Money Into Blocked Account indicates \$48,508.47 to be deposited to a blocked account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>2. Need receipt for blocked account (Form MC-356).</p>		
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: 7-9-13	
			Updates:	
			Recommendation:	
		File 3 – Lassley		

DOD: 6-29-10	NORA ALICE BORGES was appointed Administrator with Will Annexed with Full IAEA without bond pursuant to petition by Surviving Spouse SUZY BORGES PRICE . Letters issued to NORA ALICE BORGES on 1-10-11.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Need Inventory and Appraisal. Probate Code §8800. <i>Note: I&A is overdue by over two years per Probate Code §8800(b).</i> Need first account or petition for final distribution. <i>Note: Closing the estate is over a year overdue per Probate Code §12200.</i> <p><u>Note:</u> It was originally estimated the estate at a total of \$17,680, which consisted of personal property, the nature of which is unknown, valued at \$10,000.00 and real property valued at \$151,000, but encumbered at \$143,320, a net estimated value of \$7,680.</p> <p><u>Note:</u> The will devises the entire estate to Surviving Spouse Suzy Borges Price.</p>
Aff.Sub.Wit.		
Verified	On 6-13-13, the Court set this status hearing for failure to file Inventory and Appraisal and Petition for Final Distribution.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Notice was sent to Attorney Richard Wheeler, Administrator Nora Alice Borges, and Surviving Spouse Suzi Borges Price on 6-13-13.	
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: 7-9-13
		Updates:
		Recommendation:
		File 4 – Price

DOD: 10-12-12		<p>EDDIE J. ROGERS, son, was appointed as Administrator with Will Annexed with Limited IAEA and bond of \$55,000.00 on 4-4-13.</p> <p>Bond has not yet been filed, and Letters have not yet issued.</p> <p>At hearing on 4-4-13, the Court set this status hearing for proof of bond.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Petition to Eliminate Bond and Allow Deposit of Funds in Blocked Account is set for hearing on 8-12-13.</p>	
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: 7-9-13
				Updates:
				Recommendation:
		File 9 – Rogers		

Probate Status Hearing Re: Filing First Account and Inventory & Appraisal

<p>DOD: 4-19-04</p>	<p>STEPHEN RONALD CLOUD was appointed Executor with full IAEA without bond on 8-29-06 and Letters Issued 8-30-06.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
<p>Cont from 121312, 011413, 021113, 030413, 060713</p>	<p>Inventory and appraisal was due 12-29-06.</p>	<p>Note: The Order Approving Sixth and Final Account and Report of Conservator of the Person and Estate of Conservatee in 0458379 was filed 3-6-13.</p>
<p>Aff.Sub.Wit.</p>	<p>First account or petition for final distribution was due 8-30-07.</p>	<p>Note: Now that the conservatorship estate has concluded, it appears this estate matter can go forward.</p>
<p>Verified</p>	<p>Status Report filed 11-6-12 by attorney Perkins states this estate is dependent on the receipt of assets from the conservatorship estate. The Conservator has refiled his Sixth and Final Account that is set for hearing on 12-13-12. Immediately upon settling, Executor will prepare and file an Inventory and Petition for Final Distribution to close the decedent's estate.</p>	<p>1. Need Inventory and Appraisal 2. Need First Account or Petition for Final Distribution or written status report pursuant to Local Rule.</p>
<p>Inventory</p>	<p>Declaration of Stephen Ronald Cloud in Response to Order to Show Cause filed 11-6-12 states he was not able to file an inventory or otherwise proceed because the conservatorship assets have not yet been delivered to the estate. Executor hopes the Court will realize that he has done all he could to act as Executor and hopes that he will not be sanctioned. Executor sincerely apologizes to the Court and its staff for the unusual amount of the Court's time that has been taken while he has tried to conclude the Conservatorship and this matter.</p>	<p>Status Report filed 6-6-13 (not verified by Executor) states I&A was submitted to the Probate Referee on 6-5-13, and will be filed with the final petition upon return. Executor believes 2 weeks should be sufficient to have these items filed.</p>
<p>PTC</p>	<p>Status Report filed 6-6-13 (not verified by Executor) states I&A was submitted to the Probate Referee on 6-5-13, and will be filed with the final petition upon return. Executor believes 2 weeks should be sufficient to have these items filed.</p>	<p>Note: As of 7-9-13, no I&A has been filed.</p>
<p>Not.Cred.</p>		<p>Reviewed by: skc</p>
<p>Notice of Hrg</p>		<p>Reviewed on: 7-9-13</p>
<p>Aff.Mail</p>		<p>Updates:</p>
<p>Aff.Pub.</p>		<p>Recommendation:</p>
<p>Sp.Ntc.</p>		<p>File 11 - Cloud</p>
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
<p>Letters</p>		
<p>Duties/Supp</p>		
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>		
<p>Aff. Posting</p>		
<p>Status Rpt</p>		
<p>UCCJEA</p>		
<p>Citation</p>		
<p>FTB Notice</p>		

Atty Turner, Patrick A. (for Nancy Varela – Executor)

Atty Tillman, Lisa (Deputy Attorney General – for DHS Estate Recovery Section)

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

DOD: 3-16-08		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>First and Final Account filed 6-27-13 is set for hearing 8-7-13.</p>
Cont. from 121412, 020813, 051013		
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: 7-9-13
		Updates:
		Recommendation:
		File 13 - Betts

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution (Prob. C. 12200, et seq.)

DOD: 8-29-08	DIANE PICKERING , family friend, was appointed Executor with Full IAEA without bond and Letters issued on 1-13-09.	NEEDS/PROBLEMS/COMMENTS:
		<u>OFF CALENDAR</u>
	On 1-26-12 , the Court set status hearing for failure to file a First Account or Petition for Final Distribution.	This hearing was reset to 8-9-13 pursuant to Order 6-28-13.
Cont. from 031412, 050212, 062012, 092112, 092812, 031513, 051713	Minute Order 3-14-12: Counsel advises the Court that there is an insurance issue that he is trying to resolve.	Note: Executor was appointed in January 2009 (over four years ago). This is the 8th status hearing regarding failure to file I&A and account.
Aff.Sub.Wit.		The original petition indicated an estimated estate value of \$130,000.00 in personal property (nature unknown, as I&A has not been filed).
Verified		Decedent's will devises the entire estate to The Mildred Pearl Rancilio Living Trust.
Inventory	Minute Order 5-2-12: Matter continued to 6-20-12. Counsel is directed to file the required items by 6-20-12.	<u>As of 5-13-13, nothing further has been filed by the Executor.</u>
PTC		The following issues remain:
Not.Cred.	Minute Order 6-20-12: Matter set for status on 9-21-12.	1. Need Inventory and Appraisal.
Notice of Hrg		2. Need First Account Current or Petition for Final Distribution pursuant to Probate Code §12200.
Aff.Mail	Minute Order 9-21-12: No appearance. The Court sets the matter for an Order to Show Cause regarding failure to appear and imposition of sanctions in the amount of \$450.00. Sheldon Feigel is ordered to be personally present on 9-28-12.	3. A Request for Special Notice was filed 4-29-13 by Mary Catherine Cooper, beneficiary of the trust. Any further hearings must be properly noticed by the Executor per Probate Code §1252.
Aff.Pub.		
Sp.Ntc.	Minute Order 9-28-12: Counsel advises the Court that he is waiting on the assets from the estate. The Order to Show Cause is dismissed.	
Pers.Serv.		
Conf. Screen	Minute Order 3-15-13: Counsel informs the Court that they may be administering this matter outside of Probate. Counsel requests a two month continuance.	
Letters		
Duties/Supp	Minute Order 5-17-13: No appearance. The Court sets the matter for an Order to Show Cause on 7-12-13 regarding Sheldon Feigel's failure to appear and imposition of sanctions in the amount of \$500.00. The Court orders Sheldon Feigel and Diane Pickering to be personally present on 7-12-13. The Court indicates for the minute order that it will be addressing the issue of removing Diane Pickering as Executor at the next hearing.	
Objections		
Video Receipt	Pursuant to Ex Parte Order on 6-28-13, the status hearing is reset to 8-9-13.	
CI Report		
9202 Order		
Aff. Posting		Reviewed by: skc
Status Rpt X		Reviewed on: 7-9-13
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 14A - Rancilio

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$500.00

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>This hearing was reset to 8-9-13 pursuant to Order 6-28-13.</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 7-9-13
		Updates:
		Recommendation:
		File 14B – Rancilio

14B

Status Hearing Re: Settlement Agreement

	<p>JAMES LOUIS ROBERTS, Executor, filed a petition for determination of the beneficiaries under the will and for final distribution .</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
<p>Cont. from 032913, 051013, 060713</p>	<p>Executor requested the court find that West Park Baptist Church was the beneficiary of the remaining estate consisting of \$119,359.98.</p>	<p>Minute Order 3-29-13: Mr. Bagdasarian informs the Court that they are waiting on the final document to be executed.</p>
<p>Aff.Sub.Wit.</p>		<p>Minute Order 5-10-13: Mr. Roberts advises the Court that he has all the changes to the agreement and all he needs to do is put it together. Mr. Roberts further advises that he may have the final version out to everyone today.</p>
<p>Verified</p>		<p>Note: Status Report filed 6-5-13 states no response has been received from the other counsel. Proposed agreement is attached, but not signed.</p>
<p>Inventory</p>	<p>ANNA B. HINLEY and FRANCES ALBERS, Trustees of the Chester and Lorene Living Trust dated 4/12/07 filed objections requesting distribution of 50% interest in the net Estate be made to the Chester and Lorene Living Trust dated 4/12/2007, and that the Estate be ordered to reimburse Gary Bagdasarian the sum of \$18,095.71 as compensation for services on behalf of the Objectors.</p>	<p>Minute Order 6-7-13: Mr. Roberts informs the Court that the agreement is ready to be signed. Continued to 7-12-13.</p>
<p>PTC</p>		<p>As of 7-9-13, nothing further has been filed.</p>
<p>Not.Cred.</p>		<p>1. Need Settlement Agreement and Order for Distribution according to Settlement Agreement.</p>
<p>Notice of Hrg</p>		<p>Reviewed by: skc</p>
<p>Aff.Mail</p>		<p>Reviewed on: 7-9-13</p>
<p>Aff.Pub.</p>		<p>Updates:</p>
<p>Sp.Ntc.</p>	<p>Minute Order 1-2-13: Greg Roberts appearing via conference call. Ms. Lind objects to the payment of fees to Mr. Bagdasarian's client. The Court sets a Settlement Conference on 3/4/13. The Court directs counsel to submit their Settlement Conference Statements on week before the hearing. Matter set for Court Trial on 3/15/13 with a one day estimate.</p>	<p>Recommendation:</p>
<p>Pers.Serv.</p>		<p>File 15 - Beeler</p>
<p>Conf. Screen</p>		
<p>Letters</p>	<p>Minute Order 3-4-13: Also present in the courtroom are Donna Wyatt and Gail Brown. Frances Albers is appearing via conference call. Parties reach a settlement agreement as fully stated on the record by Mr. Roberts. Parties agree that the trust will waive any and all claims as to the Probate estate. In addition, parties agree to waive further accountings of the trust and estate and all objections are withdrawn. Upon inquiry by the Court, each party individually agrees to the terms and conditions of the settlement agreement. Mr. Roberts is directed to prepare the settlement agreement. The settlement agreement and order regarding the withdrawals from the blocked account(s) to be submitted on an ex parte basis. Set on 3/29/13 at 9am in Dept 303 for Status Re: Settlement Agreement</p>	
<p>Duties/Supp</p>		
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>	<p>X</p>	
<p>Aff. Posting</p>		
<p>✓ Status Rpt</p>		
<p>UCCJEA</p>		
<p>Citation</p>		
<p>FTB Notice</p>		
<p></p>	<p>Order signed 3-15-13 provides at #8: "The beneficiary of the amount of \$119,359.98 will be covered in the Settlement Agreement.</p>	

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Status Report filed by Gary Bagdasarian, attorney for beneficiaries Anna B. Hinley and Frances Albers, states Attorney Gregory J. Roberts was asked to prepare and has provided a draft Settlement Agreement. Attorney Bagdasarian has provided proposed changes. A final Settlement Agreement has not been received as of 5-8-13. Upon receipt, the attorney will review and provide any final requests for modifications and approval.

Status Report filed by Ruth P. Lind, attorney for Executor James Louis Roberts, states the proposed agreement did not accurately reflect the agreement of the parties. Stefanie Krause prepared a form of suggested revisions and emailed them to Mr. Roberts and Mr. Bagdasarian on 3-25-13. On 3-30-13, Mr. Roberts responded that Mr. Bagdasarian's changes were not included in her revision, but that if it was sent in Word, he would incorporate all changes into one new document. The document was sent as requested to Mr. Roberts on 4-1-13.

Mr. Roberts and his clients did not attend the status hearing on 3-29-13 and the Court continued the matter to 5-10-13. Stefanie Krause followed up with an email to Mr. Roberts on 5-4-13; however, to date, there has been no communication from Mr. Roberts.

Status Conference Declaration filed 6-5-13 by Attorney Gregory J. Roberts for Trustee Gail Brown states on 5-24-13, he emailed to counsel Ruth Lind, Stefanie Krause and Gary Bagdasarian what he believed to be a final settlement (attached). He has not heard anything from counsel regarding additional changes or whether or not the agreement as written is acceptable. He emailed again on 6-5-13.

Attorney Roberts believes the matter has settled and the attached agreement correctly reflects the agreement of all parties with all of the changes made by counsel.

Note: The settlement agreement attached, which provides for a distribution of \$69,000.00 to the 2007 Trust, with the assets remaining to be used for costs and fees of administration, with the remainder to West Park, is not signed.