



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.

Atty Lucich, Jr., Nicholas L., of Helon & Manfredi (for Petitioner Jose Delgado, Administrator)

(1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Statutory Administrator's Fees and Statutory and Extraordinary Attorney's Fees and (3) For Final Distribution

DOD: 11/15/2004	JOSE DELGADO , son and Administrator, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. Need Declarations under Probate Code § 13100 to be filed on behalf of the successors of the deceased heirs.	
	Account period: 11/15/2004 – 5/31/2013			
	Accounting	-		\$135,057.73
	Beginning POH	-		\$135,000.00
	Ending POH	-		\$ 24,292.56 (all cash)
Cont. from	Administrator	-		\$2,160.00
<input type="checkbox"/> Aff.Sub.Wit	(statutory)			
<input checked="" type="checkbox"/> Verified	Attorney	-		\$2,160.00
<input checked="" type="checkbox"/> Inventory	(statutory)			
<input checked="" type="checkbox"/> PTC	Attorney XO	-		\$4,280.61
<input checked="" type="checkbox"/> Not.Cred.	(consisting of 30% of remaining assets, resulting in hourly rate of \$45.00/hr; please refer to itemization and Declaration of Donald R. Forbes attached as Exhibit B; fee would be \$18,890.00 for over 94 hours @ \$200/hr in connection with two litigation matters: § 850 petition to establish claim of ownership; to defend action by heir re: creditor's claim.)			
<input checked="" type="checkbox"/> Notice of Hrg	Costs	-		\$5,191.95
<input checked="" type="checkbox"/> Aff.Mail	(costs associated with litigation to recover Decedent's residence, including depositions, duplication of records, service of subpoenas, witness fees; filing fees; probate referee; publication; recording fees; certified copies.)			
<input type="checkbox"/> Aff.Pub.	Closing	-		\$500.00
<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 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 type="checkbox"/> FTB Notice	N/A			
	~Please see additional page~			
			Reviewed by: LEG	
			Reviewed on: 7/16/13	
			Updates:	
			Recommendation:	
			File 1 – Delgado	

Petitioner states two of Decedent's children died in 2012, and they each were survived by children, three of whom are identified; Petitioner believes the deceased heirs may also have other children, and Petitioner anticipates that prior to the hearing, the successors of the deceased heirs, Benito Delgado and Juan Delgado, will be determined; Declarations under Probate Code § 13100 will be filed on behalf of said successors.

Distribution pursuant to intestate succession is to:

- **JOSE DELGADO – \$1,000.00 cash** and 1/10 of after discovered property and unexpended closing reserve;
- **DIANA GRANADOS – \$1,000.00 cash** and 1/10 of after discovered property and unexpended closing reserve;
- **ATANACIO DELGADO, SR. – \$1,000.00 cash** and 1/10 of after discovered property and unexpended closing reserve;
- **SUCCESSORS OF BENITO DELGADO – \$1,000.00 cash** and 1/10 of after discovered property and unexpended closing reserve;
- **RAYMUNDO DELGADO, JR. – \$1,000.00 cash** and 1/10 of after discovered property and unexpended closing reserve;
- **GLORIA DELGADO – \$1,000.00 cash** and 1/10 of after discovered property and unexpended closing reserve;
- **LIDIA ARMENTA – \$1,000.00 cash** and 1/10 of after discovered property and unexpended closing reserve;
- **STEVE DELGADO – \$1,000.00 cash** and 1/10 of after discovered property and unexpended closing reserve;
- **SUCCESSORS OF JUAN DELGADO – \$1,000.00 cash** and 1/10 of after discovered property and unexpended closing reserve;
- **AMELIA GARCIA – \$1,000.00 cash** and 1/10 of after discovered property and unexpended closing reserve;
- IF any after discovered property results in total distribution to each heir listed above of more than **\$2,811.95**, then **ROSALINDA DELGADO** shall receive 1/11 of any excess over said amount and the shares of other heirs in after discovered property shall be reduced from 1/10 to 1/11, pursuant to *Settlement Agreement* providing for reduction of share by amount of costs awarded against her in § 850 litigation matter.

Atty Matlak, Steven M.

Atty Barron, Richard B.

Petition of Trustee for Approval of Second Account Current, for Approval of Trustee's Fees and for Authorization to Compensate Counsel for the Trustee

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>CONTINUED TO 08/06/13</u> Per request of Counsel</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:
		Reviewed on: 07/16/13
		Updates:
		Recommendation:
		File 3 – Diaz

Petition for Settlement of First Account Current and Report of Trustee; and for
 Approval of Trustee's Fees and Attorney's Fees and Costs [Prob. C. 3600, et seq.]

		BRUCE BICKEL , Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 04/20/12 – 04/30/13	
		Accounting - \$410,842.81	
		Beginning POH - \$0.00	
		Ending POH - \$398,884.56	
Cont. from		Trustee - \$7,980.00 (per	
<input type="checkbox"/>	Aff.Sub.Wit.	itemization for 45.2 hours @ \$150/hr., 7.8 hours	
<input checked="" type="checkbox"/>	Verified	@ \$125/hr., 2.5 hrs. @ \$90/hr., and 3.9 hours at	
<input type="checkbox"/>	Inventory	no cost. Services provided include: care and	
<input type="checkbox"/>	PTC	custody of the assets comprising the corpus of	
<input type="checkbox"/>	Not.Cred.	the Trust, periodic review of Trust assets,	
<input checked="" type="checkbox"/>	Notice of Hrg	investment of Trust assets, working with the	
<input checked="" type="checkbox"/>	Aff.Mail	beneficiary's mother re reimbursable out-of-	
<input type="checkbox"/>	Aff.Pub.	pocket expenses, preparation of the	
<input type="checkbox"/>	Sp.Ntc.	accounting, and other trust management	
<input type="checkbox"/>	Pers.Serv.	duties.)	
<input type="checkbox"/>	Conf. Screen	Attorney - \$2,703.50 (per	
<input type="checkbox"/>	Letters	itemization for 1.5 hrs. @ \$320/hr., 1.6 hrs. @	
<input type="checkbox"/>	Duties/Supp	\$75/hr., 5.6 hrs. @ \$130/hr., 4.9 hrs. @ \$195/hr.,	
<input type="checkbox"/>	Objections	and 2 hrs. @ \$210/hr. Services provided	
<input type="checkbox"/>	Video Receipt	include: court appearances, advising trustee	
<input type="checkbox"/>	CI Report	re bond and annuity planning, preparation	
<input checked="" type="checkbox"/>	2620(c)	and filing of documents.)	
<input checked="" type="checkbox"/>	Order	Costs - \$200.00 (filing	
<input type="checkbox"/>	Aff. Posting	fees)	
<input type="checkbox"/>	Status Rpt	Bond currently set at \$464,792.37 is sufficient.	
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice	Petitioner prays that:	
		1. The First Account Current and Report of	
		Trustee be settled, allowed, and	
		approved as filed;	
		2. Petitioner be authorized and directed	
		to pay himself the requested Trustee	
		Fees;	
		3. Petitioner be authorized and directed	
		to pay the requested attorney's fees	
		and costs.	
			Reviewed by: JF
			Reviewed on: 07/16/13
			Updates:
			Recommendation:
			File 4 – Malos

Pro Per Elmfors, Tamarra Leigh Cadd (Pro Per Petitioner)

**Petition to Determine Succession to Real Property and Personal Property
(Prob. C. 13151)**

DOD: 2/23/2013		TAMARRA LEIGH CADD ELMFORS <i>(relationship to Decedent unstated), is</i> Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	<p>Continued from 6/3/2013. Minute Order states examiner notes are provided to the Petitioner. The Court directs the Petitioner to meet with Court Examiner Leann Ginther forthwith. Matter continued to 7/22/2013.</p> <ol style="list-style-type: none"> <i>Petition</i> is signed by DEBORAH L. ATKINSON, an unidentified party, and Petitioner Tamarra Elmfors. It is unclear whether Petitioner intends to be the sole Petitioner, or intends Deborah Atkinson to be Co-Petitioner, though Ms. Atkinson is not named on any of the pleadings other than at the signature line of the <i>Petition</i>. Need clarification regarding whether Deborah L. Atkinson claims an interest in the subject real property and/or personal property. <i>Final Inventory and Appraisal</i> attached to the <i>Petition</i> identifies the Estate of ELLEN PAULINE CADD, while the <i>Petition</i> identifies the matter as PAULINE CADD ELMFORS. Need clarification regarding the correct name of Decedent's estate. <p align="center">~Please see additional page~</p>
Cont. from 060313		No other proceedings	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	I & A - \$ 149,523.76	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<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"/>	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: LEG
			Reviewed on: 7//13
			Updates:
			Recommendation:
			File 9 - Elmfors

NEEDS/PROBLEMS/COMMENTS, continued:

3. Need *Attachment 11* to the *Petition* containing: **(a)** the legal description of the real property and its Assessor's Parcel Number (APN) pursuant to Probate Code § 13152(a)(3), and a description of the personal property; and **(b)** the percent of Decedent's interest in the property.
4. Item 13 of the *Petition* does not state the specific property interest claimed by each petitioner in the real property and personal property.
5. Item 14 of the *Petition* is incomplete, as it does not list the names, relationships to Decedent, ages and residence or mailing addresses so far as known to or reasonably ascertainable by the Petitioner of all persons claiming an interest in the property, any spouse and children of Decedent, and all other heirs of Decedent. Need *Attachment 14* to the *Petition* containing this information.
6. Pursuant to Probate Code § 13153, need proof of mailed service of *Notice of Hearing* for all persons required to be served with notice pursuant to Probate Code § 13152(a)(7). (Note: Item 14 of *Petition* does not list any persons who would be entitled to notice, as noted above.)
7. Proposed order does not but should include in Item 9(a) a description of the personal property as well as the real property. In addition, proposed order must include in Item 9(b) all persons claiming an interest in the real and personal property, including Deborah L. Atkinson, if it is confirmed that she claims an interest, and the specific property interest claimed by each. Need revised proposed *Order Determining Succession to Real Property* containing the legal description of the real property and specifying the percentage of each Petitioners' property interest.

(1) First and Final Report and Account or Personal Representative and (2) Petition for Allowance of Compensation to Personal Representative and (3) Attorney for Ordinary and Extraordinary Services and for (4) Final Distribution

DOD: 3-5-12		<p>LOUISE TABOR, Administrator with Will Annexed, with full IAEA without bond, is Petitioner.</p> <p>Account period: 6-7-12 through 3-31-13</p> <p>Accounting: \$1,027,589.03 Beginning POH: \$1,017,847.15 (See Needs/Problems/Comments #2) Ending POH: \$1,006,804.15 (cash)</p> <p>Administrator (Statutory): \$23,136.25</p> <p>Administrator (Extraordinary): \$1,000.00 (per Local Rule, for sale of house)</p> <p>Attorney (Statutory): \$23,136.25</p> <p>Closing: \$750.00</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 7-8-13</p> <p>Minute Order 7-8-13: Counsel informs the Court that he will be filing an amendment. Counsel requests a continuance. Continued to: 7/22/13</p> <p>As of 7-16-13, nothing further has been filed.</p> <ol style="list-style-type: none"> Petition is not verified. Need verification pursuant to Probate Code §§ 1021, 1023. Need Inventory and Appraisal pursuant to Probate Code §8800. <i>Note: The petition indicates that two I&As totaling \$1,017,847.15 exist; however, none were ever filed.</i> <p><i>Note: Petitioner calculates statutory fees, gains, losses, etc., with reference to inventory figures; however, because no I&As have been filed, Examiner is unable to verify.</i></p> <ol style="list-style-type: none"> Petition and order both state: "Decedent's will dated November 18, 1993, was admitted to probate by order of this Court on June 5, 2012." However, Court records indicate that Decedent's Will dated 11-14-06 was admitted to probate on 6-7-12. <u>Need clarification:</u> Is this a clerical error, or are there additional details or documents that the Court is not aware of?
Cont. from 070813			
Aff.Sub.Wit.			
Verified	X		
Inventory	X		
PTC	X		
<input checked="" type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
<input checked="" type="checkbox"/> Letters	6-11-12		
Duties/Supp			
Objections			
Video Receipt			
CI Report			
<input checked="" type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
<input checked="" type="checkbox"/> FTB Notice			
		<p>Distribution pursuant to Decedent's Will dated 11-14-06:</p> <ol style="list-style-type: none"> Kathy Garrison: \$53,265.65 William Garrison: \$53,265.65 Ann Marie Tung: \$53,265.65 Steve Dustrude: \$53,265.65 Richard Garrison: \$53,265.65 Dale Garrison: \$53,265.65 Gary Tabor: \$53,265.65 Linda Hamilton: \$53,265.65 Suzanne Tabor Snowden: \$53,265.65 Florence Schmidt Craig: \$53,265.65 Evelyn Brown: \$53,265.65 James Schmidt: \$53,265.65 Nina Cook Levens: \$53,265.65 Donna Evans: \$53,265.65 Ted Schmidt: \$53,265.65 Carolyn Wheeler: \$53,265.65 Peggy Cook Pollay: \$53,265.65 Dean Garrison: \$53,265.65 	
		<p>SEE ADDITIONAL PAGES</p> <p>Reviewed by: skc</p> <p>Reviewed on: 7-16-13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 – Garrison</p>	

NEEDS/PROBLEMS/COMMENTS (Cont'd):

4. Four (4) creditor's claims were filed. Need Allowance or Rejection of each claim with notice as appropriate, or withdrawals from the creditors.

Note: Petitioner indicates some were paid in full and some were negotiated; however, formal notice of Allowance or Rejection via Form DE-174 is required by Probate Code §§ 9250, 9252.

5. Disbursements Schedule indicates that Petitioner paid her own creditor's claim in the amount of \$2,323.85 without prior Court allowance in violation of Probate Code §9252. Need clarification.
6. Disbursements Schedule indicates payment to Ken and Florence Craig for expenses of administration in the amount of \$101.81; however, no explanation is provided. Need clarification.
7. One heir, Dean Garrison, resides in Thailand. Pursuant to Probate Code §8113, additional notice to a recognized diplomatic or consular official is required if property will pass to a citizen of a foreign country. Need clarification as to whether this additional notice is required. If so, further continuance may be necessary.