



## 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.



**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><b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>See Page 12 for a related matter.</b></p>
	<p>The Court accepted Mr. Donaldson's withdrawal as executor on 7/26/13 and appointed the Public Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p>	<p><b>CONTINUED FROM 06/24/15</b>  <b>Minute Order from 06/24/15 states: Mr. Rindlisbacher reports that he received the records and is working on amending the account.</b></p> <p><b>As of 07/27/15, nothing further has been filed.</b></p> <ol style="list-style-type: none"> <li>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.</li> </ol>
<p><b>Cont. from 040714, 050514, 070714, 090814, 102314, 012115, 032515, 062415</b></p>		
<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> 07/27/15</p>
		<p><b>Updates:</b></p>
		<p><b>Recommendation:</b></p>
		<p><b>File 2A – 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>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>CONTINUED FROM 06/24/15</b></p> <p><b>Minute Order from 06/24/15 states:</b> The Court imposes the previously ordered \$600.00 sanction as to Mr. Donaldson and orders that it be paid within one week.</p> <p>As of 07/27/15, nothing further has been filed and it does not appear that the sanctions have been paid.</p>					
<p><b>Cont. from 010214, 013014, 022014, 041714, 050514, 070714, 090814, 102314, 012115, 032515, 062415</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>	<table border="1"> <tr> <td><b>Reviewed by:</b> JF</td> </tr> <tr> <td><b>Reviewed on:</b> 07/27/15</td> </tr> <tr> <td><b>Updates:</b></td> </tr> <tr> <td><b>Recommendation:</b></td> </tr> <tr> <td><b>File 2B – Wallace</b></td> </tr> </table>	<b>Reviewed by:</b> JF	<b>Reviewed on:</b> 07/27/15	<b>Updates:</b>	<b>Recommendation:</b>	<b>File 2B – Wallace</b>
<b>Reviewed by:</b> JF							
<b>Reviewed on:</b> 07/27/15							
<b>Updates:</b>							
<b>Recommendation:</b>							
<b>File 2B – Wallace</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>							

**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>	<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 06/24/15</b> <b>Minute Order from 06/24/15 states:</b> The Court imposes the previously ordered \$800.00 sanction as to Mr. Donaldson and orders that it be paid within one week.  <b>As of 07/27/15, nothing further has been filed and it does not appear that the sanctions have been paid.</b>
<b>Cont. from 010214, 013014, 022014, 050514, 070714, 090814, 102314, 012115, 032515, 062415</b>	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.	
<b>Aff.Sub.Wit.</b>	<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.	
<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> 07/27/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2C – Wallace</b>

**Second and Final Account and Report of Personal Representative and Petition for Its Settlement; Petition to Determine Entitlement to Estate Distribution, and for Allowance of Commission and Attorneys' Fees for Ordinary and Extraordinary Services; and for Final Distribution**

<b>DOD: 01/21/10</b>	<b>DOUGLAS J. GEIST</b> , Administrator, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Examiner is unable to verify the proposed distribution because it does not appear that enough information has been provided to calculate the percentage to be distributed to each heir based on their degree of relationship to the decedent. Need more information.</p>
	Account period: <b>09/08/12 – 03/31/15</b>	
<b>Cont. from</b>	Accounting - <b>\$57,215.98</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$93,469.78</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH - <b>\$52,955.63</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Administrator (statutory) - <b>\$3,669.29</b>	
<input checked="" type="checkbox"/> <b>PTC</b>	Attorney - <b>\$3,669.29</b>	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Attorney x/o - <b>\$4,884.50</b>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	(itemized by date for preparation of payroll and income tax returns and sales of real property)	
<input checked="" type="checkbox"/> <b>Aff.Mail</b> w/	Costs - <b>\$590.97</b>	
<b>Aff.Pub.</b>	(certified copies, filing fees, copies and postage for more than 10 recipients)	
<b>Sp.Ntc.</b>	Closing - <b>\$2,500.00</b>	
<b>Pers.Serv.</b>	<b>The following Creditor's Claims have been allowed and will be paid:</b>	
<b>Conf. Screen</b>	Data Central Collection Bureau, LLC - <b>\$990.50</b>	
<b>Letters</b>	Education Employees Credit Union - <b>\$6,807.97</b>	
<b>Duties/Supp</b>	Valerie Whittington - <b>\$300.00</b>	
<b>Objections</b>	Elizabeth Rodarte - <b>\$820.50</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>		

**Distribution, pursuant to intestate succession, is to:**

**Continued on Page 2**

Terry Geist	-	\$1,795.15	Evelyn E. Maxey	-	\$797.91
Deney Geist	-	\$1,795.15	Charles R. Tidd Estate	-	\$2,394.03
Douglas J. Geist	-	\$1,196.87	Barbara Tidd	-	\$1,197.00
Vicki Patton	-	\$1,196.87	Robert Tidd	-	\$1,197.00
Elaine Beck	-	\$1,196.87	Richard Dahms	-	\$2,392.59
Grace Kaiser	-	\$897.57	James Dahms	-	\$2,392.59
Wayne Phelps	-	\$897.57			
Betty Reed	-	\$897.57			
Jim Phelps	-	\$897.57			
Phillip Francis	-	\$132.96			
Perry Francis	-	\$132.96			
Matthew Francis	-	\$132.96			
Margo Wilde	-	\$199.45			
Michael Ray Sipe, Jr.-		\$66.48			
Sandy Prall	-	\$66.48			
Sonja Gapinski	-	\$66.48			
Patricia Scales	-	\$132.99			
Carol Smith	-	\$132.99			
Vicki Haskins	-	\$132.96			
Elmer L. Francis estate -		\$398.92			
Betty Joan Rhodes	-	\$398.92			
Marvin Francis	-	\$99.72			
Norman Francis	-	\$99.72			
John Francis	-	\$99.72			
Kendall Francis	-	\$99.75			
Max B. Jackson*	-	\$398.92			
Rex Wayne Jackson-		\$398.92			
Donald Max Francis -		\$398.92			
Gary Stephen Newman -		\$399.09			
Sharon E. Chambers-		\$399.09			
Carol Reynolds	-	\$266.09			
Teri Lago	-	\$266.06			
Russell Newman	-	\$266.06			
Evette N. Newman	-	\$199.47			
Joshua Newman	-	\$49.89			
Ashley Silva	-	\$49.86			
Gregory Newman	-	\$49.86			
Matthew Newman	-	\$49.86			
Adrienne Newman	-	\$199.47			
Michael Newman	-	\$199.47			
William Newman	-	\$199.47			
Kerry Newman	-	\$199.47			
Patricia Newman	-	\$199.47			
Shirley Raleigh	-	\$199.47			
Steve Newman	-	\$266.09			
Barbara Newman	-	\$266.06			
Richard Alan Newman -		\$266.06			

**4 Faith Amariah Esqueda (GUARD/P)**

**Case No.11CEPR00602**

**Petitioner Amalia Molly Dominguez (Pro Per – Maternal Grandmother – Petitioner)**

**Petition for Appointment of Guardian of the Person (Prob. Code §1510)**

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Continued from 6/24/15</u></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice on: <ul style="list-style-type: none"> <li>- Faith Esqueda (Minor)</li> <li>- Sam Esqueda (Father)</li> </ul> </li> <li>3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> <li>- Ray Gomez (Maternal Grandfather)</li> <li>- Paternal Grandfather (not identified)</li> <li>- Paternal Grandmother (not identified)</li> </ul> </li> </ol>	
Cont. from 062415				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 7/24/15		
		Updates:		
		Recommendation:		
		File 4 – Esqueda		

Attorney Horton, Lisa (for Petitioner Cynthia Jane Tosi, Guardian of the Estate)  
**Second and Final Account and Report of Guardian; petition for Its Settlement: for Allowance of Attorney Fees and Reimbursement of Costs Advanced; for Termination of Guardianship of the Estate; for Final Distribution and for Discharge of Guardian**

		<b>CYNTHIA JANE TOSI</b> , mother and Guardian of the Estate, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Paragraph 9 of the <i>Petition</i> states Petitioner's attorney will accept the sum of <b>\$2,200.00</b> rather than the <b>\$2,500.00</b> flat fee pursuant to Local Rule 7.16(B)(4). However, the authorized flat fee is <b>\$1,250.00</b> for each timely filed subsequent account, which describes the instant <i>Second Account</i>. Therefore, need itemized declaration in compliance with CA Rule of Court Rule 7.751(b) referring to Rule 7.702 in support of the attorney fee request.</p>
		<u><b>Account period: 9/11/2013 – 5/26/2015</b></u>	
<b>Cont. from</b>		Accounting - <b>\$21,916.29</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$21,912.80</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Ending POH - <b>\$18,688.29</b> <i>(all cash)</i>	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Guardian - <b>waives</b>	
<input type="checkbox"/>	<b>PTC</b>	Attorney - <b>\$2,200.00</b> <i>(exceeds Local Rule 7.16)</i>	
<input type="checkbox"/>	<b>Not.Cred.</b>	Costs - <b>\$435.00</b> <i>(filing fee)</i>	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Bond - <b>\$26,377.00</b> <i>(filed 8/6/2012)</i>	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>		
<input 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 type="checkbox"/>	<b>Letters</b>	<b>Petitioner prays for an Order:</b>	
<input type="checkbox"/>	080612	1. Approving, allowing and settling the Second and Final account and approving all acts and transactions of the Guardian as set forth in the account;	
<input type="checkbox"/>	<b>Duties/Supp</b>	2. Authorizing payment of the Attorney fees and reimbursement of costs;	
<input type="checkbox"/>	<b>Objections</b>	3. Authorizing distribution of the remaining balance of the Guardianship estate account to <b>TYLER JAMES DONDLINGER</b> , who has reached age 18; and	
<input type="checkbox"/>	<b>Video Receipt</b>	4. Discharging the Guardian of the estate and her bond upon the filing of a receipt from [Tyler] for all funds received and the filing of an Ex Parte Petition for Final Discharge and Order.	
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>2620</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> LEG	
		<b>Reviewed on:</b> 7/27/15	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 6 – Dondlinger</b>	

**7 Darlene Kaye Hanggi (Estate)**

**Case No. 12CEPR01149**

Attorney **Gin, Robert W. (for Terri Denise Gill, Executor)**  
 Attorney **Pape, Jeffrey B. (for Robert Hanggi, estranged spouse)**

**First and Final Account and Report of Administration, Petition for Settlement, for Allowance of Statutory Compensation to Executor and to Attorneys, and for Final Distribution**

<b>DOD: 4/14/2012</b>	<b>TERRY DENISE GILL</b> , daughter and Executor, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li><i>Summary of Account</i> lists charges as <b>\$158,079.10</b>, while credits are listed as <b>\$159,686.59</b>, resulting in an unexplained difference of <b>\$1,607.49</b>, causing the accounting not to balance. Charges must equal credits as provided by Probate Code § 1061(c). Need clarification and/or amended account pursuant to Probate Code § 1060 et seq.</li> <li><i>Partial No. 1 Inventory and Appraisal</i> filed on 7/12/2013 is incomplete at Item 5 re: property tax certificate, as required by Probate Code § 8800(d). Need statement regarding Property Tax Certificate. (Revenue and Tax Code § 480.)</li> <li>Need itemization of costs requested for reimbursement as required by Local Rule 7.17(C) for the Court in its discretion to consider and approve reimbursement to attorney of allowable costs advanced.  <b>~Please see additional page~</b></li> </ol>
	<b>Account period: 2/19/2013 – 4/29/2015</b>	
<b>Cont. from</b>	Accounting - <b>[\$158,079.19?]</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Beginning POH - <b>\$137,079.10</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	Ending POH - <b>\$113,058.83</b> (\$4,057.43 cash)	
<input checked="" type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>	X	
<input checked="" type="checkbox"/> <b>Not.Cred.</b>	Executor - <b>[\$5,112.37]</b> <i>(statutory)</i>	
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	Attorney - <b>[\$5,112.37]</b> <i>(statutory)</i>	
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	W /	
<input type="checkbox"/> <b>Aff.Pub.</b>	Attorney XO - <b>\$12,290.30</b> <i>(per Declaration in Support of Request filed 7/29/2015 and itemization in Exhibit C; for obtaining family law attorney records related to Decedent's dissolution; for petition for a probate homestead over Decedent's residence owned by Decedent and Robert Hanggi, and settlement agreement preparation resulting in resolution of dispute; for obtaining survey of property for fence; for assistance with determining available well water on acreage; [un-totaled hours] @ attorney rates of \$225/hr and \$250/hr;)</i>	
<input checked="" type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>		
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>	021913	
<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 checked="" type="checkbox"/> <b>9202</b>		
<input checked="" type="checkbox"/> <b>Order</b>	Costs - <b>\$1,347.42</b> <i>(not itemized)</i>	
<input type="checkbox"/> <b>Aff. Posting</b>	Closing - <b>\$2,000.00</b>	
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input checked="" type="checkbox"/> <b>FTB Notice</b>		
	<b>~Please see additional page~</b>	
	<b>Reviewed by: LEG</b>	
	<b>Reviewed on: 7/27/15</b>	
	<b>Updates:</b>	
	<b>Recommendation:</b>	
	<b>File 7 – Hanggi</b>	

**Distribution pursuant to Decedent's Will and to Order Approving Settlement filed 4/29/2015 is to:**

- **DARLENE HANGGI LIVING TRUST** – entire estate valued at **[\$88,762.49?]**, consisting of **\$5,000.00** payment from estranged spouse **ROBERT HANGGI** to the Estate of Darlene Kaye Hanggi in settlement of the saddle dispute and other monetary issues; award to **ROBERT HANGGI** of a Probate Homestead in the community property interest which the Estate has in the residence with Robert responsible for repairs, maintenance, taxes and insurance of residence; relinquishment of **ROBERT HANGGI'S** license to use the road on the Decedent Darlene Hanggi's property; relinquishment of **ROBERT HANGGI'S** license to use a water pipeline crossing Decedent Darlene Hanggi's property; **ROBERT HANGGI** will at his sole expense install a new water meter as specified in **Order Approving Settlement filed 4/29/2015**, and Estate of Darlene Haggi will install a new water meter as specified in **Order Approving Settlement filed 4/29/2015**.

**Petitioner prays for an Order:**

5. Approving, allowing and settling the First and Final account;
6. Ratifying, confirming and approving all acts and transactions of the Petitioner relating to matters set forth in the account;
7. Authorizing payment of the Executor and Attorney fees and commissions and closing reserve;
8. Authorizing payment of the Extraordinary Attorney fees; and
9. Distributing the estate of the Decedent remaining in Petitioner's hands to the Trustee of the **DARLENE HANGGI LIVING TRUST**.

**NEEDS/PROBLEMS/COMMENTS, continued:**

4. *Schedule F Disbursements* shows payments from the estate made to the Attorney. Paragraph 18 of the *Petition* states the Executor on behalf of the Trustee of the DARLENE HANGGI LIVING TRUST has paid to the law firm the sum of \$3,453.62, which is credited against the costs of administration advanced and attorney's fees, leaving unpaid the sum of \$3,006.17, which should be allowed. CA Rule of Court 7.700 provides the personal representative must not pay and the attorney must not receive statutory fees or fees for extraordinary services in advance of a court order authorizing their payment, and the court may impose sanctions against the personal representative or attorney, and surcharge with interest from the date of payment, the personal representative for payment of the fees in advance of court order.
5. Paragraph 18 of the *Petition* states the attorneys will advance certification and recording fees for the Judgement of Final Distribution in an unknown sum at this time, all of which should be reimbursed from the reserved being requested. No closing reserve funds shall be used for attorney fees pursuant to Local Rule 7.12.6(D).
6. *Exhibit A, Computation of Statutory Compensation* does not account for the \$18,204.50 "loss on other disposition" described in Schedule G which were concluded to be the separate property of Decedent's spouse and thus not part of the Decedent's estate. Therefore, the statutory fee base should be \$118,874.60 and the fee calculates as \$4,566.24 rather than \$5,112.37.

~Please see additional page~

**NEEDS/PROBLEMS/COMMENTS, continued:**

7. Need Declaration of Trustee pursuant to Local Rule 7.12.5, which provides that if property in the estate is to be distributed to a pre-existing trust, the current trustee must file a declaration setting forth the name of the trust, its establishment date, and taxpayer identification number, verifying that the trust is in full force and effect, and that the trustee has an executed copy of the trust in possession. *(Note: Written Acceptance of Trust filed 6/29/2015 in compliance with Probate Code § 10694(b)(4) is distinct from the declaration required by Local Rule 7.12.5.)*
8. Need clarification regarding the source of payment for the attorney fees and cost reimbursement based upon statement in Paragraph 21 of the Petition stating that the sum of \$0.00 cash will remain in the estate less payments for commissions and fees, costs and closing reserve.
9. Need revised proposed order based upon the issues raised regarding incorrect calculations.

**Petition for Final Distribution on Waiver of Accounting**

<b>DOD: 12/7/2013</b>	<b>THOMAS BRESSLER</b> , Executor, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>Petition does not list the Creditor's Claim of Bank of America in the amount of \$6,630.96 filed on 4/25/14. California Rules of Court, Rule 7.403.</li> <li>Need Allowance or Rejection or Rejection of Creditor Claim of Bank of America. California Rules of Court, Rule 7.401.</li> <li>Petitioner indicates he made preliminary distributions of the 1,858 shares of PG&amp;E common stock to the beneficiaries of the estate (620 shares to Thomas, 620 shares to Sally and 618 shares to Derek). Derek should receive an equal share or an offset from other assets of the estate.</li> <li>Need receipts from the beneficiaries for preliminary distributions of the PG&amp;E common stock and personal property.</li> <li>Petition does not contain a statement regarding if notice to the Franchise Tax Board was performed, as required by Probate Code 9202(c)(1).</li> <li>Need property on hand schedule. California Rules of Court, Rule 7.651.</li> <li>Order does not comply with Local Rule 7.6.</li> </ol>
	Accounting is waived.	
<b>Cont. from</b>		
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	I & A - <b>\$206,733.74</b>	
<input checked="" type="checkbox"/> <b>Verified</b>	POH - <b>???</b>	
<input checked="" type="checkbox"/> <b>Inventory</b>	Executor - <b>waives.</b>	
<input checked="" type="checkbox"/> <b>PTC</b>		
<input checked="" type="checkbox"/> <b>Not.Cred.</b>		
<input checked="" type="checkbox"/> <b>Notice of Hrg</b>	<b>Distribution, pursuant to Decedent's Will, is to:</b>	
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>	Thomas Bressler - 1/3	
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input checked="" type="checkbox"/> <b>Pers.Serv.</b> W/O	Sally Bressler - 1/3	
<input type="checkbox"/> <b>Conf. Screen</b>	Derek Weibel - 1/3	
<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: KT</b>
		<b>Reviewed on: 7/27/15</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 8 – Bressler</b>

Report of Sale and Petition for Order Confirming Sale of Real Property

		<b>DEBORAH TITUS</b> , Conservator, is petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Wednesday, August 26, 2015</b> at 9:00 a.m. in Department 303, for the filing of the receipt for blocked account.</li> </ul> <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>
		<b>Sale price</b> - <b>\$37,000.00</b>	
		<b>Overbid</b> - <b>39,350.00</b>	
<b>Cont. from</b>		<b>Reappraisal</b> - <b>\$37,500.00</b> (50% interest)	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	<b>Property</b> - 2340 E. Clay	
<input checked="" type="checkbox"/>	<b>Verified</b>	<b>Publication</b> - Business Journal	
<input type="checkbox"/>	<b>Inventory</b>	<b>Buyers</b> - Michael Huber, an unmarried man.	
<input type="checkbox"/>	<b>PTC</b>	<b>Broker</b> - <b>\$1,665.00</b> (4.5% - payable to Wainwright & Associates)	
<input type="checkbox"/>	<b>Not.Cred.</b>	Current bond is \$20,000.00	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	All proceeds to be placed into a blocked account.	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W/		
<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 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 checked="" 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 on:</b> 7/27/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 9 – Dolby</b>

**12 Paul Harvey Wallace Trust**

Case No. 14CEPR00601

Atty Petoyan, Marcus (for Laura Leonard – beneficiary/Petitioner)  
 Atty Kruthers, Heather (for Public Administrator – successor trustee)

Probate Status Hearing RE: Account

<b>DOD: 06/22/07</b>	<p><b>LAURA LEONARD</b>, step-daughter and beneficiary of the Trust, filed a <b>PETITION FOR ORDER ACCEPTING RESIGNATION OF TRUSTEE AND FOR APPOINTMENT OF THE FRESNO COUNTY PUBLIC ADMINISTRATOR SUCCESSOR TRUSTEE</b> on 07/02/14.</p> <p>On 08/25/14, the Petition was granted and the <b>PUBLIC ADMINISTRATOR</b> was appointed as Successor Trustee.</p> <p><b>Minute Order in related matter estate matter for Paul Harvey Wallace</b> set this matter for a status hearing on 3/25/15.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>See pages 2A, 2B and 2C for related matter.</p> <p><u>CONTINUED FROM 06/24/15</u>  <b>Minute Order from 06/24/15 states:</b>                  The Court allows preliminary distributions from the Trust.</p>
Cont. from 032515, 062415		
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		
	<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 07/27/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 12 - Wallace</b></p>	

**13A Alveon LaJuan Moultrie (GUARD/E)**

Case No. 14CEPR00956

Guardian Alvin Moultrie (Pro Per – Father – Guardian of the Estate)

Status RE: Receipt of Blocked Account

	ALVIN MOULTRIE, Father, was appointed Guardian of the Estate without bond on 3/24/15.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Receipt and Acknowledgment of Order for the Deposit of Money into Blocked Account (MC-356).</p>
	The Court originally ordered \$29,750.00 to be placed into a blocked account based on the file and set status hearing for the filing of the receipt for blocked account.	
	At the hearing on 7/1/15, it was determined that the correct amount was \$20,002.62 and the Court signed a new blocking order.	
Cont from 050615, 052715, 070115, 071515		
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: 7/24/15
		Updates:
		Recommendation:
		File 13A - Moultrie

13A

**13B Alveon LaJuan Moultrie (GUARD/E) Case No. 14CEPR00956**

Guardian Moultrie, Alvin (Pro Per – Father – Guardian of the Estate)

Probate Status Hearing Status RE: Filing of the Inventory and Appraisal.

	ALVIN MOULTRIE, Father, was appointed Guardian of the Estate without bond on 3/24/15.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Inventory and Appraisal per Probate Code §2610 or written status report per Local Rule 7.5.
	At the hearing on 3/24/15, the Court set this status hearing for the filing of the Inventory and Appraisal.	
<b>Cont. from 072115</b>		
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: 7/24/15
		Updates:
		Recommendation:
		File 13B – Moultrie

13B

**14A Aniyah La'Nay Moultrie (GUARD/E)**

**Case No. 14CEPR00957**

**Guardian Alvin Moultrie (Pro Per – Father – Guardian of the Estate)**

**Status RE: Receipt of Blocked Account**

	<p><b>ALVIN MOULTRIE</b>, Father, was appointed Guardian of the Estate without bond on 3/24/15.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<p>The Court originally ordered \$29,750.00 to be placed into a blocked account based on the file and set status hearing for the filing of the receipt for blocked account.</p>	<p><b>2. Need Receipt and Acknowledgment of Order for the Deposit of Money into Blocked Account (MC-356).</b></p>
<b>Cont from 050615, 052715, 070115, 071515</b>	<p>At the hearing on 7/1/15, it was determined that the correct amount was \$20,002.62 and the Court signed a new blocking order.</p>	<p><b>Note: The EECU Verification of Deposit attached to the declaration does not confirm that the funds are deposited into a blocked guardianship estate account. The mandatory Judicial Council form MC-356 must be used for this purpose.</b></p>
<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>Declaration filed 7/10/15 states</b> Mr. Moultrie would like the Court to release \$10,000.00 to purchase a family vehicle for transportation for his children to and from school and doctor appointments, clothing and shoes, their own dressers, and a TV. These monies would help in many ways to help dispel from their memory the tragedy of their mother's murder. The children were present in the home they shared with their mother when this took place. He is trying to give them stability and a normal life. Their mother's death was traumatic and they are all just trying to live and heal from the devastation that her death caused.</p>	<p><b>3. Petitioner's declaration appears to request a lump sum from both minors' accounts. A proper Petition for withdrawal of Funds from Blocked Account (Mandatory Judicial Council Form MC-357) must be appropriately filed in each minor's estate, with a proposed order thereon (MC-356), and the Court may require additional information or noticed hearing.</b></p>
	<p>Attached to the declaration are printouts from EECU for each child reflecting that \$20,002.62 was deposited for Alveon and \$20,002.61 was deposited for Aniyah, both appear to be "joint" accounts with the guardian.</p>	<p><b>Reviewed by:</b> skc</p>
		<p><b>Reviewed on:</b> 7/24/15</p>
		<p><b>Updates:</b></p>
		<p><b>Recommendation:</b></p>
		<p><b>File 14A - Moultrie</b></p>

**14B Aniyah La'Nay Moultrie (GUARD/E)**

**Case No. 14CEPR00957**

Guardian **Alvin Moultrie (Pro Per – Father – Guardian of the Estate)**

**Probate Status Hearing**

**Status RE: Filing of the Inventory and Appraisal.**

	<b>ALVIN MOULTRIE</b> , Father, was appointed Guardian of the Estate without bond on 3/24/15.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>2. Need Inventory and Appraisal per Probate Code §2610 or written status report per Local Rule 7.5.</b></p>
	At the hearing on 3/24/15, the Court set this status hearing for the filing of the Inventory and Appraisal.	
<b>Cont from 072115</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> skc
		<b>Reviewed on:</b> 7/24/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 14B - Moultrie</b>

Petition for Termination of Proceedings and Discharge of Executor for Want of Assets Subject to Administration

DOD: 6/2/14		<p><b>DYLON CAMPBELL</b>, Executor, is petitioner.</p> <p><b>Petitioner states</b> after the initiation of the probate proceedings and the appointment of Petitioner as Executor, Petitioner found that there is no property of any kind belonging to the estate and subject to administration. There is no longer any necessity for continuing the administration of the estate.</p> <p><b>Wherefore, Petitioner requests orders as follows:</b></p> <ol style="list-style-type: none"> <li>Administration of the estate be immediately terminated for want of assets;</li> <li>Petitioner be discharged as the Executor of the estate.</li> </ol>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>	
Cont. from 062415				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
	Aff.Pub.			
✓	Sp.Ntc.			W/
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: KT		
		Reviewed on: 7/24/15		
		Updates:		
		Recommendation: SUBMITTED		
		File 15 - Campbell		

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

	See petition for details.	NEEDS/PROBLEMS/COMMENTS:	
Cont. from 062415			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		W
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		W
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 6/18/15	
		Updates:	
		Recommendation:	
		File 17 - Sanchez	

Attorney

Kruthers, Heather H. (for Public Guardian – Petitioner)

Attorney

Teixeira, J. Stanley (Court appointed for proposed Conservatee)

Attorney

Petty, Teresa B., in association with Horton, Lisa M. (for Robert Renovato – Objector)

## Petition for Appointment of Probate Conservator of the Person and Estate

		See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
Cont from 070115			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
	Conf. Screen		
✓	Letters		
	Duties/Supp		
✓	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Court Investigator advised rights on 6/19/15
			Voting rights affected – need minute order
			<u>Note:</u> A Request for Special Notice was filed 6/22/15 by interested person Kathy Walters of Woodland Hills, CA, by her attorney, Christopher E. Overgaard of Glendale, CA. Kathryn Walters is Ms. Walters' niece and conservator of Ms. Walters' brother Robert Walters.
			<u>Note:</u> If granted, the Court will set status hearings as follows:
			<ul style="list-style-type: none"> <li>• Wed, Dec. 2, 2015 for filing Inventory and Appraisal</li> <li>• Wed, Oct. 5, 2016 for filing the first account.</li> </ul>
			If the proper items are on file, the status hearing may come off calendar.
			Reviewed by: skc
			Reviewed on: 7/24/15
			Updates:
			Recommendation:
			File 20 – Walters