

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

DOD: 3/16/2001	<p>ARTHUR ROTH and HOWARD ROTH were appointed co-executors with full IAEA authority and without bond on 10/23/2001.</p> <p>Letters issued on 10/23/2001.</p> <p>Inventory and appraisal was due 2/23/2001.</p> <p>First account or petition for final distribution was due 10/23/2002.</p> <p>Notice of Status Hearing was mailed to Attorney Eliot Nahigian on 7/31/2013.</p> <p>Status Report filed on 4/16/14 states Arthur Roth is the sole surviving co-executor. Howard Roth died on 9/10/2010. No inventory and appraisal has been filed in this estate. Decedent's assets were held in a living trust and no probate administration of Decedent's assets was necessary. Prior to Decedent's death a lawsuit was filed for breach of contract, open book account and quantum meruit against the Decedent. The primary purpose of opening the estate was to defend the lawsuit. The lawsuit was settled and a dismissal of the action was entered on 4/9/2013. Through inadvertence the estate was left open. Attorney Eliot Nahigian experienced a major medical issue that caused him to be out of the office for an extended period of time. He has returned to work on a limited basis and expects to make a full recovery. Additional time is requested to finish the petition for termination of proceedings.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Petition for Termination of Proceedings filed and set for hearing on 9/4/14.</p>
Cont. from 100414, 041814		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
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Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: KT</p> <p>Reviewed on: 8/13/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1 - Roth</p>	

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

Status Hearing Re: Filing of the Second Account

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR</p> <p><i>Second Account Current and Report of Guardian filed 7/30/2014 is set for hearing on 9/10/2014</i></p>
Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
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	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
		Reviewed by: LEG
		Reviewed on: 8/13/14
		Updates:
		Recommendation:
		File 2 – Estrada

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

Status Hearing Re: Accounting

Age: 95 years	PUBLIC GUARDIAN was appointed Conservator of the Person and Estate on 3/10/2009.	NEEDS/PROBLEMS/COMMENTS:
	<i>Letters issued on 3/10/2009. First Amended Letters issued on 9/5/2012 granting medical consent and dementia powers.</i>	OFF CALENDAR
Cont. from	<i>Minute Order dated 6/14/2012 from the hearing on the second account set the matter for status hearing on 8/15/2014 for filing of the next account of the conservatorship.</i>	Order Settling Second Account Current and Report of Conservator filed 6/14/2012 dispensed with further accountings as long as conditions of Probate Code § 2628(b) continue to be met.
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		Order of Judicial Review of Court Investigator's Report filed 4/15/2014 set the matter for further judicial review in March 2016.
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<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 type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: LEG
<input type="checkbox"/> Status Rpt		Reviewed on: 8/13/14
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 3 – Booth

DOD: 12-21-12	<p>ROBERT SHAW, GAYDEN L. SCHORLING, and DOUGLAS D. SCHORLING were appointed as Co-Administrators with Limited IAEA without bond on 2-7-13. Letters issued on 2-8-13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> On 6-4-13, after Court Trial, the Court denied the petitions of Sharlene and James Battaglia to determine entitlement and for family allowance.</p> <p>Thereafter, on 7-2-13, the Co-Administrators filed the Final I&A indicating a total estate value of \$655,522.13 consisting of \$520,022.13 cash plus residential real property and various vehicles and personal property items.</p> <p>On 6-2-14, the Court confirmed the sale of the real property.</p> <p>Verified Status Report filed 8-13-14 states the estate is not yet in a condition to close because it was recently learned that the decedent owes taxes for 2010. The Co-Administrators are following up with the Franchise Tax Board for additional information, and have not been advised as to whether anything additional is owed to the IRS. As such, an additional 45 days is requested.</p> <p>1. Need First Account or Petition for Final Distribution or 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.</p>
Cont. from 041114		
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: 8-13-14
		Updates:
		Recommendation:
		File 4 – Marden

DOD: 02/14/13	JUDGE SINGH BRAR , son, was appointed Executor with full IAEA and without bond on 06/12/13. Letters Testamentary were issued on 06/12/13.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Accounting/Report of Administration and Petition for Final Distribution and/or current written status report.</p>	
Cont. from	Inventory & Appraisal, final, filed 08/27/13 - \$2,711,583.00		
Aff.Sub.Wit.			
Verified			
Inventory	Inventory & Appraisal, Supplemental No. 1, filed 12/11/13 -\$171,804.95		
PTC			
Not.Cred.			
Notice of Hrg	Inventory & Appraisal, Supplemental No. 1 corrected, filed 05/12/14 - \$101,043.95		
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: JF
			Reviewed on: 08/13/14
		Updates:	
		Recommendation:	
		File 5 – Brar	

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Order on Settlement of Waiver of Account filed 01/08/14
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
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Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
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Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 08/13/14
		Updates:
		Recommendation:
		File 6 - McInturff

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Final I & A filed 06/26/14
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		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 08/13/14
		Updates:
		Recommendation:
		File 7 – Nay

Status Hearing Re: Filing of the Inventory and Appraisal

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Final I & A filed 06/26/14
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<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 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: JF
		Reviewed on: 08/13/14
		Updates:
		Recommendation:
		File 8 – Steffensen

Status Hearing Re: Filing of the Inventory and Appraisal

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR. INVENTORY AND APPRAISAL FILED 07/14/2014.</u>
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: LV
		Reviewed on: 08/13/2014
		Updates:
		Recommendation:
		File 9 – Centrone

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 06/30/2013	ROBERT LEE ADAMS , was appointed Executor with full IAEA authority, with bond set at \$13,000.00 on 04/16/2014.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal or 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.</p>
	Bond was filed 05/20/2014 in the amount of \$13,000.00.	
	Letters were issued on 05/20/2014.	
	Minute Order of 04/16/2014 set this status hearing for the filing of the Inventory and Appraisal.	
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		
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Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 08/13/2014
		Updates:
		Recommendation:
		File 10 – Edmonds

Atty LeVan, Nancy J., sole practitioner (for Karen Maxwell Grimes, Administrator)

Status Hearing Re: Filing of the Inventory and Appraisal

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR</p> <p><i>Final Inventory and Appraisal filed 8/12/2014.</i></p>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input checked="" type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<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	
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<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: 8/13/14
		Updates:
		Recommendation:
		File 11 – Maxwell

Atty McCloskey, Daniel T. (for Rachelle Ireland, Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;">OFF CALENDAR</p> <p><i>Final Inventory and Appraisal filed 5/16/2014.</i></p> <p><i>Supplemental Inventory and Appraisal filed 6/29/2014.</i></p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
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Letters		
Duties/Supp		
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Video Receipt		
CI Report		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 8/13/14
		Updates:
		Recommendation:
		File 12 – Stafford