

DOD: 4-4-13	<p>BETTY A. PATE, Daughter, was appointed as Executor with Full IAEA without bond on 7-24-13 and Letters issued on 8-2-13.</p> <p>At the hearing on 7-24-13, the Court set this status hearing for the filing of the first account or petition for final distribution.</p> <p>Inventory and Appraisal filed 4-24-14 indicates a total estate value of \$644,428.38 consisting of real property, an Installment Note secured by deed of trust with assignment of rents, and a vehicle.</p> <p>The first account or petition for final distribution is now due. Probate Code §12200.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution or verified written status report pursuant to local rule.</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: 9-16-14
		Updates:
		Recommendation:
		File 1 - Guidi

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: 3-7-06	<p>HAL B. HAVLISCH was appointed Executor with Full IAEA without bond and Letters issued on 5-24-06.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 3-14-14</u></p> <p><u>As of 9-16-14, nothing further has ben filed.</u></p> <p>Note: The Executor, attorney Hal B. Havlisch, was previously represented by attorney Thomas C. Peterson, now deceased.</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> <p>Note: The decedent's will devises the entire estate to GOOD SHEPHERD LUTHERAN HOME OF THE WEST in Fountain Valley, CA.</p>
Cont'd from 031414		
Aff.Sub.Wit.	<p>Final Inventory and Appraisal filed 10-27-06 indicated a total estate value of \$148,162.92, including \$3,517.92 cash plus real property, personal property including a stamp collection valued at \$1,500.00, and a vehicle.</p>	
Verified		
Inventory	<p>On 11-30-06, a Notice of Proposed Action was filed indicating that the Executor intended to sell the real property for \$100,000.00 cash.</p>	
PTC		
Not.Cred.	<p>Nothing further was filed.</p>	
Notice of Hrg		
Aff.Mail	<p>On 12-20-13, the Court set this status hearing for failure to file a first account or petition for final distribution and mailed notice to Hal. Havlisch.</p>	
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>Reviewed by: skc</p> <p>Reviewed on: 9-16-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2 – Muhley</p>

DOD: 9/25/2011	<p>JULIO A. HINOJOSA was appointed Executor with full IAEA authority and without bond on 6/18/2012.</p> <p>Letters issued on 6/18/2012.</p> <p>Inventory and appraisal was filed on 11/1/2012 showing the estate valued at \$1,892.89.</p> <p>On 4/18/2013 Gary Bagdasarian substituted out as the attorney of record and Nathan Powell of Dowling, Aaron, Inc. substituted in.</p> <p>Status Report of Attorney Kent J. Klassen filed on 7/2/14 states the Executor and the plaintiff in the civil matter mediated the civil lawsuit on 3/3/14. All settlement documents have been exchanged. Due to inadvertence the file did not get into the right hands after the companion case was completed. Mr. Klassen requests an additional 45 days to complete these tasks.</p> <p>Status Report of Attorney Kent J. Klassen filed on 8/27/14 states the accounting itself is done, but there are documents that the Trustee/Executor needs to sign. It is respectfully requested that the status hearing be continued an additional 20 days to obtain the signatures on the documents.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Petition to Terminate Proceedings has been filed and is set for hearing on 10/16/14.</p>
Cont. from 080213, 020314, 041414, 071414		
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: KT
		Reviewed on: 9/15/14
		Updates:
		Recommendation:
		File 4 – Hinojosa

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

DOD: 8/24/2008	VICTORIA PUMAREJO was appointed as Executor with full IAEA authority and without bond on 9/7/10.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need inventory and appraisal completed by the probate referee pursuant to probate code §8800 and petition for final distribution.</p> <p>Note: Even if the real property cannot sell there is no reason the inventory and appraisal cannot be filed. The inventory and appraisal includes the property of the estate as of the date of death and must be appraised by the probate referee. See Probate Code §8800 et seq.</p>
	Letters issued on 9/7/10.	
Cont. from 031414	Inventory and appraisal was due February 2011.	
Aff.Sub.Wit.	First account or petition for final distribution was due December 2011.	
Verified	Creditor's Claim of the Auditor Controller/Treasurer-Tax Collector was filed on 12/17/10 in the amount of \$17,863.50.	
Inventory	Status Report filed on 9/9/14 states this is a single asset probate case. The only asset is real property. The real property has been maintained since the decedent's death by the decedent's son who continues to reside in the real property. The beneficiaries of the estate are decedent's children including the executor. When the estate was first opened the property was listed for sale. After an unsuccessful listing the property was taken off the market. The property is listed at \$93,000.00 as of September 7, 2014.	
PTC	Ms. Pumarejo and the attorney submit that any technical failure to file the inventory and appraisal in this case is non-prejudicial, since there is nothing to inventory that was not already disclosed in the petition for probate.	
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: KT
		Reviewed on: 9/16/14
		Updates:
		Recommendation:
		File 4 – Maestas

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

DOD: 05/27/2013	TERRI MAY , friend, was appointed Executor with full IAEA without bond on 07/17/2013.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need First Account or Petition for Final Distribution.</p>
	Letters issued on 07/18/2013.	
Cont. from	Inventory & Appraisal, partial No. 1 was filed on 09/19/2013 showing a value of \$746,852.68.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Inventory & Appraisal, partial No. 2 was filed on 12/02/2013 showing a value of \$500,886.05	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	Inventory & Appraisal, final was filed on 08/26/2014 showing a value of \$1,021,389.55	
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.	Minute Order of 07/17/2013 set this status hearing for the filing of the First Account and/or Petition for Final Distribution.	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Status Report filed 08/26/2014 states decedent's mother, Geraldine Duffy Nichols, passed away on 05/09/2013. Her estate was administered in this Court (Case No. 13CEPR00504) and this estate was ordered distributed to the Estate of Roberta Jeanne Duffy. The Order for Final Distribution is dated 07/17/2014. The Final Inventory and Appraisal was submitted to the referee so that he can appraise the assets that have now poured from Geraldine Duffy Nichols' estate to the Roberta Jeanne Duffy estate. We are waiting for Rick Smith, referee, to return a completed Inventory and Appraisal so that it can be filed with the Court. Meanwhile, the decedent's 2013 income taxes have been prepared and filed. Roberta J. Duffy's estate inherited a house from Geraldine Duffy Nichols' estate. Executor Terri May is in the process of getting the house ready to be sold. As soon as the house is sold, Teri May and Attorney Istanboulian will be ready to filed the Petition for Final Distribution.	
<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: LV

Reviewed on: 09/16/2014

Updates:

Recommendation:

File 5 - Duffy

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

DOD: 08/21/2012	GILDA N. WALKER , daughter, was appointed Administrator with Limited IAEA authority without bond on 08/16/2013. \$75,700.00 ordered to be placed in a Blocked account.	<p>NEEDS/PROBLEMS/COMMENTS:</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	Letters issued on 08/30/2013.	
Aff.Sub.Wit.	Receipt for Blocked account in the amount of \$75,700.00 was filed on 09/24/2013.	
Verified	Inventory & Appraisal filed 10/30/2013 showing a value of \$191,350.00.	
Inventory	Minute Order of 07/18/2013 set this status hearing for the filing of the First Account and/or Petition for Final Distribution.	
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: 09/16/2014
		Updates:
		Recommendation:
		File 6 - Miles

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

DOD: 05/24/2013	PUBLIC ADMINISTRATOR , was appointed Administrator with Will annexed with full IAEA authority without bond on 07/17/2013.	<p>NEEDS/PROBLEMS/COMMENTS:</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>
	Letters issued on 07/18/2013	
Cont. from	Inventory & Appraisal filed 10/02/2013 showing a value of \$554,115.48.	
Aff.Sub.Wit.	Minute Order of 07/17/2013 set this Status Hearing for the filing of the First Account and/or Petition or Final Distribution.	
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: 09/16/2014
		Updates:
		Recommendation:
		File 7 - Grover

DOD: 1-14-14	<p>KIRSTEN AMY ELVES, Daughter, was appointed as Executor with Full IAEA without bond and Letters issued on 4-14-14.</p> <p>At the hearing on 4-14-14, the Court set this status hearing for the filing of the Inventory and Appraisal.</p> <p>Status Report filed 9-11-14 states the Executor has experienced some delays in marshaling the assets of the estate because she does not live in Fresno. She now believes she has identified and located all assets and has completed the I&A and submitted to Mr. Diebert. Once the I&A is complete it will be filed.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal. Probate Code §8800.</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		
	<p>Reviewed by: skc</p> <p>Reviewed on: 9-16-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9 - Anderson</p>	

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 1-23-14	<p>DEBORAH FOULGER, Spouse, was appointed Executor with Full IAEA without bond and Letters issued on 4-15-14.</p> <p>At the hearing on 4-15-14, the Court set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal pursuant to Probate Code §8800 or verified written status report pursuant to Local Rule 7.5.</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		
	<p>Reviewed by: skc</p>	
	<p>Reviewed on: 9-16-14</p>	
	<p>Updates:</p>	
	<p>Recommendation:</p>	
	<p>File 10 - Foulger</p>	

DOD: 1-12-14	<p>CHARLTON W. MOORE and LORENE E. MOORE, son and daughter, were appointed as Co-Administrators with Full IAEA without bond and Letters issued on 4-10-14.</p> <p>At the hearing on 4-10-14, the Court set this status hearing for the filing of the Inventory and Appraisal.</p> <p>I&A Partial #1 was filed 8-5-14; however, a Final I&A has not yet been filed.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>2. Need Final Inventory and Appraisal pursuant to Probate Code §8800 or verified written status report pursuant to Local Rule 7.5.</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		
	<p>Reviewed by: skc</p>	
	<p>Reviewed on: 9-16-14</p>	
	<p>Updates:</p>	
	<p>Recommendation:</p>	
	<p>File 11 - Moore</p>	

