



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 Barron, Richard B., of Luke & Barron, Visalia (for Perine & Dicken, Co-Trustees)

Probate Status Hearing Re: Filing of Bond

Age: 16 years	RONALD DICKEN, PATRICIA DICKEN, KAREN STEELE, and CHRISTOPHER KENNEDY , were appointed Co-Trustees on 6/11/2012 with bond set at \$500,000.00 .	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;">OFF CALENDAR</p> <p style="text-align: center;">Additional Bond of Trustees in the amount of \$15,000.00 was filed on 8/21/2012, bringing total amount of posted bond to \$475,000.00.</p>
	Proof of bond posted in the amount of \$500,000.00 was filed on 7/22/2010.	
Cont. from	<i>Revised Order Approving First Account Current of Trustee</i> filed 9/8/2011 reduced bond to \$460,000.00 .	
<input type="checkbox"/> Aff.Sub.Wit.	<i>Confirmation of Bond Reduction</i> filed 10/6/2011 indicates the new bond of \$460,000.00 will be in effect as of 9/8/2011, and is signed by Phillips Bonding and Insurance Agency.	
<input type="checkbox"/> Verified	<i>Order Settling Trustee's Second Account Current, etc.</i> , filed 8/2/2012 ordered bond be increased to \$475,000.00 . <i>Minute Order</i> of 8/2/2012 set status hearing on 9/21/2012 for filing of the increased bond.	
<input type="checkbox"/> Inventory	<i>Additional Bond of Trustee</i> filed 8/21/2012 indicates the Trustees as Principals are bound in the sum of \$15,000.00 . Bond Company is International Fidelity Insurance Company.	
<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: LEG
		Reviewed on: 9/17/12
		Updates:
		Recommendation:
		File 2 - Herzog

Atty Wall, Jeffrey L., sole practioner (for Trustee Christine Adams)

Probate Status Hearing Re: Filing Receipt from Blocked Account

Age: 67 years		<p>CHRISTINE ADAMS, daughter, was appointed Trustee of the MICKEY FULBRIGHT GRANTOR TRUST on 2/28/2012.</p> <p>Order Authorizing Proposed Action (Substituted Judgment) filed 2/28/2012 in the Conservatorship of Mickey Lorene Fulbright (Case #04CEPR00703), created the MICKEY FULBRIGHT GRANTOR TRUST, an inter vivos trust to avoid probate upon the death of the Conservatee.</p> <p>The MICKEY FULBRIGHT GRANTOR TRUST is the sole beneficiary of the Estate of BARBARA SCHARTON (estate of the Conservatee's daughter, Case #09CEPR00512).</p> <p>Order Authorizing Addition of Assets to Grantor Trust filed 8/13/2012 authorizes the personal representative of the Estate of Barbara Sharton to add the cash distribution of \$603,639.16 to the MICKEY FULBRIGHT GRANTOR TRUST for the benefit of Mickey Fulbright as Trust Beneficiary.</p> <p>Minute Order dated 8/9/2012 from the hearing on the petition to add asset to the grantor trust set this status hearing on 9/21/2012 for filing of the receipt of blocked account for the deposit of the distribution funds.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Judicial Council mandatory-use form <i>Acknowledgment and Receipt of Funds in Blocked Account</i> for the deposit of the distribution funds.</p>
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
Blocked Recpt	X		
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: LEG	
		Reviewed on: 9/17/12	
		Updates:	
		Recommendation:	
		File 3 - Fulbright	

Status Hearing Re: 5th Account and Increase in Bond

Age: 65	DOUGLAS H. SHUMAVON , brother, is	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 8-10-12: The OSC is dismissed. Counsel advises the court that there have been preliminary discussions with the bank regarding refinancing. The Court approves the petition as prayed and increases the bond to \$355,000.00.</p> <ol style="list-style-type: none"> 1. Need proof of increased bond. 2. Need 5th account.
DOB: 7-9-47	Conservator of the Person and Estate. Current bond is \$333,451.00.	
	The 4 th Account for the period 1-1-08 through 12-31-09 was heard on 9-28-10.	
Aff.Sub.Wit.	POH at 12-31-09 was \$878,277.35, consisting of cash in the amount of \$47,223.95 plus various real and personal property including securities.	
Verified	On 8-10-12, at a hearing on a petition for authority to refinance and begin distribution from IRAs to pay expenses of the Conservatee, the Court granted the petition, and also ordered the bond increased to \$355,000.00 and set this status hearing for filing of the 5 th account and increase in bond.	
Inventory	As of 9-17-12, increased bond has not been filed, and a 5 th account has not been filed.	
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	X	
UCCJEA		
Citation		
FTB Notice		
		Reviewed on: 9-17-12
		Updates:
		Recommendation:
		File 5- Shumavon

Age: 86	<p>LAVONNE ILENE BOLAND, Daughter, was appointed Conservator of the Person and Estate with additional powers under Probate Code §2590 with bond of \$10,000.00 on 3-28-08.</p> <p>Bond was filed and Letters issued on 4-24-08.</p> <p>I&A filed 8-27-08 reflected a total value of the conservatorship estate of \$65,826.31, consisting of a one-half interest in real property in Squaw Valley, CA, a one-half interest in a mare registered as a National Show Horse, a one-half interest in two kilns, and various interests in other personal property.</p> <p>On 2-11-09, the Court authorized Conservator to fix Conservatee's residence outside the State of California. Post-Move Notice of Change of Residence reflects a new address in Bend, OR.</p> <p>On 8-12-09, the first account was settled.</p> <p>On 9-22-09, revised Letters were issued reflecting only Conservatorship of the Estate, as the equivalent of a Conservatorship of the Person was obtained in Oregon, and this Court retained jurisdiction over the estate.</p> <p>The next account is now due. The Court set this status hearing for 1-11-12 and sent notice to Conservator and Attorney Feigel on 11-3-11. It has now been continued six times to this hearing date.</p> <p>At the last hearing on 9-7-12, there were no appearances.</p> <p>As of 9-17-12, no accounting has been filed, and fees have not been paid.</p>	NEEDS/PROBLEMS/COMMENTS:
DOB: 4-2-25		<u>Note: This is the 7th hearing on failure to file a second account.</u>
Cont. from 011112, 031412, 050212, 062012, 081712, 090712		Minute Order 1-11-12: Counsel informs the Court that his client is trying to put things together and there are no more assets in the estate. Counsel requests a continuance. Counsel is informed that there is an outstanding fee of \$860.00 that needs to be paid.
Aff.Sub.Wit.		Minute Order 3-14-12: Counsel advises the Court that they are still proceeding; however, the estate has no money. Counsel requests a continuance.
Verified		Minute Order 5-2-12: Counsel advises the Court that he has received most of the documents. He further advises that the horse was given away due to costs of maintaining the horse.
Inventory		Minute Order 6-20-12: Matter continued to 6-20-12. If accounting filed by 8-17-12, the matter may be taken off calendar.
PTC		Minute Order 8-17-12: Counsel advises the Court that the accounting is ready to be filed however, he is waiting to receive the bank statements from his client. As to the \$860.00 fee that is due, counsel informs the Court that he will be filing a fee waiver. Continued to 9-7-12.
Not.Cred.		Minute Order 9-7-12: No appearances. Matter continued to 9-21-12.
Notice of Hrg		As of 9-17-12 , nothing further has been filed <u>and fees have not been paid. The following issues remain:</u>
Aff.Mail		1. <u>Need Second Account Current.</u>
Aff.Pub.		2. <u>Outstanding fees of \$860.00 are due to the Court Investigator's Office for prior investigations.</u>
Sp.Ntc.		Reviewed by: skc
Pers.Serv.		Reviewed on: 9-17-12
Conf. Screen		Updates:
Letters		Recommendation:
Duties/Supp		File 6 - Squires
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		X
UCCJEA		
Citation		
FTB Notice		

Status Conference

DOD: 7-4-08	<p>CHRISTOPHER BRIAN LITTLE, Former Executor, has a bond of \$400,000.00.</p> <p>Mr. Little's Account was heard by this Court on 8-30-12. On that date, the Court ordered that the bond presently in place be exonerated, Attorney Milnes to prepare the order (See Page 7B), and the Court set this status hearing regarding the difference between the current and previous appraisals on the eight remaining vehicles.</p> <p>David Knudson, attorney for Childers and Berg, personal representative of the estate in Arizona, filed a declaration on 9-14-12 that states the personal representative obtained appraisals on the remaining eight vehicles from Classic Auto Appraiser, a qualified appraiser of classic cars. Excerpts from the appraisals are attached.</p> <p>The appraisals indicate that the current values of seven of the vehicles are less than the date of death values shown on the inventory; one has slightly increased in value.</p> <p>The declaration states the total appraised value for the vehicles is \$253,832.00 and the current value as of 9-5-12 is \$178,500.00, a reduction of \$75,332.00.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 8-30-12: The Court advises the parties that it is considering Mr. Milnes declaration of 8/20/12 as well as all other documents as having been timely submitted. The Court notes that the objections to the accounting are now limited to ordinary and extraordinary fees. The Court orders that the bond presently in place be exonerated. Mr. Milnes is directed to prepare the order. Status hearing regarding the bond is set for 9/21/12. If the exoneration of the bond is signed by 9/21/12, no appearance will be necessary by Ms. Berger-Hoang. The Court advises all counsel that it will be expecting to hear at the next hearing what the status of the appraisal is as well what the difference is between the current and previous appraisals.</p> <p>Set on: 9/21/12 at 09:00a.m. in Dept 303 for: Status Conference. Additional hearing dates: 9/21/12 @ 9:00A Dept. 303 for: Status: Exoneration of Bond</p> <p>1. The declaration filed by Attorney Knudson is not verified by the fiduciary pursuant to Probate Code §§ 1021, 1023.</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		
<input checked="" type="checkbox"/> Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: skc		
Reviewed on: 9-17-12		
Updates:		
Recommendation:		
File 7A - Little		

DOD: 7-4-08		<p>CHRISTOPHER BRIAN LITTLE, Former Executor, has a bond of \$400,000.00.</p> <p>Mr. Little's Account was heard by this Court on 8-30-12. On that date, the Court ordered that the bond presently in place be exonerated, Attorney Milnes to prepare the order.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 8-30-12:</u> The Court advises the parties that it is considering Mr. Milnes declaration of 8/20/12 as well as all other documents as having been timely submitted. The Court notes that the objections to the accounting are now limited to ordinary and extraordinary fees. The Court orders that the bond presently in place be exonerated. Mr. Milnes is directed to prepare the order. Status hearing regarding the bond is set for 9/21/12. If the exoneration of the bond is signed by 9/21/12, no appearance will be necessary by Ms. Berger-Hoang. The Court advises all counsel that it will be expecting to hear at the next hearing what the status of the appraisal is as well what the difference is between the current and previous appraisals. Set on: 9/21/12 at 09:00a.m. in Dept 303 for: Status Conference. Additional hearing dates: 9/21/12 @ 9:00A Dept. 303 for: Status: Exoneration of Bond</p> <p>2. Need order.</p>
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
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Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed on: 9-17-12	
		Updates:	
		Recommendation:	
		File 7B - Little	

Age: 89	<p>CRAIG MACGLASHAN, Son, is Conservator. Current bond is \$1,099,584.00.</p> <p>On 7-25-12, the Court denied the First Amended Petition of the First Accounting and Report of the Estate and Person of Jamie McGlashan with leave to amend, and set this status hearing for the filing of a second amended account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need amended account.</p>
DOB: 10-6-22		
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		
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Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: skc</p> <p>Reviewed on: 9-17-12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 - McGlashan</p>	

Atty Shekoyan, James E., of Baker Manock & Jensen (for John R. Panzak, Jr., Executor)
 Atty Panzak, Gordon (Self-represented Estate Beneficiary)

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

DOD: 3/12/2010	<p>JOHN R. PANZAK, JR., son, was appointed Executor of the estate and <i>Letters</i> issued on 8/11/2010. John Panzak, Jr., has been Trustee of the JOHN ROBERT PANZAK TRUST dated 2007 since Decedent's death in March 2010; beneficiaries of the Will are John R. Panzak, Jr., Gordon Panzak, and the Trust; beneficiaries of the Trust are John R. Panzak, Jr., and Gordon Panzak.</p> <p>Petitions by Claimants GORDON PANZAK, son, and CHARLES PANZAK, son, were filed 3/9/2011 seeking the Court's determination of ownership of specific items of property including a pick-up truck and real property located in Santa Cruz.</p> <p>The filing of demurrers to the petition and to amended petitions resulted as follows: Court issued an <i>Order on Demurrer to First Amended Petition to Determine Ownership of Real Property</i> on 11/1/2011, which sustained the demurrer filed by John Panzak, Jr. to the first amended petition filed by Gordon Panzak. Second amended petition to determine ownership was filed by Gordon Panzak on 11/21/2011, and demurrer was filed by John Panzak, Jr. on 12/30/2011. Court took the matter under submission, and an <i>Order on Demurrer to Second Amended Petition to Determine Ownership of Real Property</i> signed on 1/31/2012 sustains the general demurrer to the second amended petition without leave to amend.</p> <p>Notice of Status Hearing filed on 7/26/2012 set a status hearing on 9/7/2012 for failure to file a first account or petition for final distribution in the estate. <i>Clerk's Certificate of Mailing</i> shows the notice of status hearing was mailed to Attorney James Shekoyan and John R. Panzak, Jr. on 7/26/2012.</p> <p>Status Report of Personal Representative filed by John R. Panzak, Jr. on 8/23/2012 states:</p> <ul style="list-style-type: none"> The probate estate has a single asset which is a brokerage account with Merrill Lynch; Most of Decedent's assets were in his living trust which are not part of the probate estate; <p style="text-align: center;">~Please see additional page~</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>Continued from 9/21/2012. <i>Minute Order</i> [Judge Kapetan] states Mr. Shekoyan not appearing, the Court directs the Clerk to contact him regarding today's hearing. Mr. Shekoyan informs the Clerk that his paralegal advised him that the matter was off calendar as a result of his recent filing. Counsel is informed that the matter is being continued to 9/21/2012.</p>
Cont. from 090712		
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: LEG</p> <p>Reviewed on: 9/17/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9 - Panzak</p>	

Status Report of Personal Representative filed 8/23/2012 by John R. Panzak, Jr., continued:

- There are currently two pending litigation matters between Petitioner and his brother, Gordon Panzak; one of the litigation matters involves the probate estate, and the second matter involves a civil litigation action filed by Gordon Panzak in Case # 11CECG00789 regarding Decedent's Trust and Trust assets; the issues in the civil litigation matter are entwined in the probate estate matter, therefore as soon as the civil litigation is resolved, Petitioner intends to close the probate estate;
- A Mandatory Settlement Conference in the civil litigation has been scheduled for **11/13/2012**, and a trial date is set of **12/12/2012**;
- Several creditor's claims were filed with the Court or presented against the estate and have been rejected by Petitioner, in sum as follows: Gordon Panzak filed on 12/8/2010 several claims including ½ interest in Santa Cruz property, rent waste and damage, pick-up truck and furniture, for a claimed value totaling in excess of **\$1 million**, all of which were rejected on 2/1/2011;
- An *Inventory and Appraisal* was filed on 4/25/2011 showing an estate value of **\$520,693.06** (please refer to Schedule A attached for summary of the inventory);
- The devisee of the estate pursuant to Decedent's Will admitted to probate on 8/22/2010 is John R. Panzak, Jr., Trustee of the John R. Panzak Living Trust;
- **Petitioner requests the Court order that the administration of this estate be allowed to continue.**

Note: Based upon representations in John Panzak, Jr.'s 8/23/2012 *Status Report* regarding the pending litigation trial date of 12/12/2012, Court may wish to set a status hearing for filing of the first account or petition for final distribution in this estate on **Friday, January 11, 2013 at 9:00 a.m. in Dept. 303.**

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

Atty Bagdasarian, Gary G., sole practitioner (for Guardian Teresa Lynn Hannon)

Status Hearing Re: Receipt of Funds in Blocked Account

Age: 2 years	TERESA LYNN HANNON, mother, was appointed Guardian of the Estate on 5/17/2012.	NEEDS/PROBLEMS/COMMENTS: Note: Minute Order dated 8/10/2012 from the last status hearing states Counsel advises the Court that there may be a problem with the receipts as the account may not be FDIC insured; however, he has not received confirmation of this. He further advises that the receipt for SunAmerica has been filed. Status hearing re: blocked account was set for 9/21/2012. 1. Per the Ex Parte Order Vacating Order for Withdrawal of Funds from Blocked Account signed 8/27/2012, need receipt for funds of \$110,000.00 placed back into the blocked account at Wells Fargo.
Cont. from 071912, 081012	Order Appointing Guardian signed 5/17/2012 ordered all funds placed into a blocked account because the minor is a beneficiary of pay on death accounts and life insurance policies as a result of the death of her grandmother.	
Aff.Sub.Wit.	Minute Order dated 5/17/2012 set status hearing on 9/20/2012 for status of filing the inventory and appraisal.	
Verified	Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account filed 6/19/2012 shows a blocked account balance of \$110,921.57 . <i>First Amended Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account</i> filed 7/11/2012 shows a blocked account balance of \$110,933.72 .	
Inventory	Ex Parte Order to Deposit Funds into Blocked Account signed on 7/10/2012 ordered any and all monthly payments from SunAmerica Life Insurance Company, made until January 7, 2030, representing a gross total amount of \$118,697.24 to be placed into a blocked account.	
Blocked Recpt	Ex Parte Order to Deposit funds into Blocked Account signed on 7/12/2012 ordered \$110,000.00 [to be moved from the Wells Fargo blocked account] and to be deposited into a blocked account with Wells Fargo Advisors; <i>Order of Withdrawal of Funds</i> was signed 7/12/2012.	
Not.Cred.		
Notice of Hrg		
Aff.Mail		
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Sp.Ntc.		
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Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
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Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

~Please see additional page~

Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account filed 8/9/2012 shows a blocked account balance [following withdrawal of the \$110,000] of **\$2,669.42**.

Ex Parte Order Vacating Order for Withdrawal of Funds from Blocked Account signed on 8/27/2012 vacated the 7/12/2012 order to deposit funds into Wells Fargo Advisors, based upon the guardian having learned from Wells Fargo's refusal to sign the *Receipt and Acknowledgment* that the Wells Fargo Advisors account is not FDIC insured.

