



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.

(1) Second Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney

Age: 86 years		PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
DOB: 11/12/1927			
		Account period: 8/1/12 – 7/31/14	<p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, September 28, 2016 at 9:00 a.m. in Department 303, for the filing of the third account. <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>
Cont. from		Accounting - \$55,120.70	
<input type="checkbox"/> Aff.Sub.Wit.		Beginning POH - \$24,286.55	
<input checked="" type="checkbox"/> Verified		Ending POH - \$ 1,723.01	
<input type="checkbox"/> Inventory		Conservator - \$2,300.64 (13.61 Deputy hours @ \$96/hr and 13.08 Staff hours @ \$76/hr)	
<input type="checkbox"/> PTC		Attorney - \$1,250.00 (less than allowed per Local Rule)	
<input type="checkbox"/> Not.Cred.		Bond fee - \$50 (o.k.)	
<input checked="" type="checkbox"/> Notice of Hrg		Petitioner prays for an Order:	
<input checked="" type="checkbox"/> Aff.Mail W/		1. Approving, allowing and settling the second account;	
<input type="checkbox"/> Aff.Pub.		2. Authorizing the conservator and attorney fees and commissions;	
<input type="checkbox"/> Sp.Ntc.		3. Payment of the bond fee.	
<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: KT
			Reviewed on: 9/22/14
			Updates:
			Recommendation:
			File 3 - Miller

Petition for First and Final Account and Report of Administratrix, Petition for Settlement, for Allowance of Attorney's Fees and Costs, for Waiver of Commission, and for Final Distribution (Prob. C. 11623)

DOD: 4/23/10	JO ANN SORIA , Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Amended Petition filed and set for hearing on 10/16/14.</p> <ol style="list-style-type: none"> 1. According to the petition there is a pending lawsuit involving the Administrator of this estate, Jo Ann Soria in her capacity as Administrator. Therefore it appears that the estate is not in a condition to close. 2. Petition requests that the Creditor's Claim filed by the Department of Health Care Services (DHCS) in the amount of \$74,720.18 become a lien against the estate's real property. Need agreement from DHCS to the terms of the lien prior to distribution. 3. Order does not comply with Local Rule 7.6.1F – Some portion of the contents of the order must appear on the page which the judge's signature is affixed. Need new order.
	Account period: 9/9/10 – 3/18/14	
	Accounting - \$83,750.00	
	Beginning POH - \$83,750.00	
	Ending POH - \$83,750.00	
Cont. from 081814	Attorney Fanucchi cost - \$799.00	
<input type="checkbox"/> Aff.Sub.Wit.	Attorney Bortolussi costs - \$799.00	
<input checked="" type="checkbox"/> Verified	Attorney Bortolussi - \$800.00 – less than statutory based on time spent on the administration.	
<input checked="" type="checkbox"/> Inventory	Petition states Attorney Edward Fanucchi was the estate's attorney prior to the filing of a Substitution of Attorney on 5/15/14. Attorney Fanucchi filed a Notice of Lien for Statutory Attorney Fees and Reimbursement for Costs Advanced stating a lien for prior attorney fees had been created in the amount of \$4,000.00. The rate of compensation was computed on the basis of a total estate of \$100,000.00. This is incorrect based on the Amended Inventory and Appraisal filed by Petitioner. Mr. Fanucchi's statutory amount at most would be \$3,350.00. Due to the conflict between the Estate and Mr. Fanucchi for the entirety of representation, which caused the probate to be significantly delayed, petitioner requests that attorney fees to Mr. Fanucchi be denied.	
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail W/		
<input type="checkbox"/> Aff.Pub.		
<input checked="" type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters 11/18/10		
<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 checked="" type="checkbox"/> FTB Notice		
	Reviewed by: KT	
	Reviewed on: 9/16/14	
	Updates:	
	Recommendation:	
	File 4 – Lucchesi	

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

	<p>ROGER DAY, son, was appointed Executor with full IAEA authority without bond on 02/20/2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
<p>Cont. from 041814, 082214</p>	<p>Letters issued 02/25/2013.</p>	<p>Minute Order of 08/22/2014: Status Hearing may come off if petition is filed.</p>
<p>Aff.Sub.Wit.</p>	<p>Inventory & Appraisal filed 02/26/2013 shows an estate valued at \$190,000.00 consisting of real property.</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>Verified</p>		
<p>Inventory</p>		
<p>PTC</p>	<p>Minute Order of 02/20/2013 set this matter for hearing.</p>	
<p>Not.Cred.</p>		
<p>Notice of Hrg</p>		
<p>Aff.Mail</p>		
<p>Aff.Pub.</p>		
<p>Sp.Ntc.</p>		
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>		
<p>Letters</p>		
<p>Duties/Supp</p>		
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>		
<p>Aff. Posting</p>		
<p>Status Rpt</p>		
<p>UCCJEA</p>		
<p>Citation</p>		
<p>FTB Notice</p>		
<p>Reviewed by: LV</p>		
<p>Reviewed on: 09/16/2014</p>		
<p>Updates:</p>		
<p>Recommendation:</p>		
<p>File 6 – Day</p>		

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

DOD: 09/01/2012	JULIE RAVISCIONI , daughter was appointed Administrator with full IAEA authority without bond on 05/15/2013.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 7B is the Order to Show Cause for Failure to Appear.</p> <p>Minute Order of 08/18/2014: Mr. Krbecheck is in trial and requests a continuance.</p> <p>Minute Order of 07/18/2014 (Judge Kristi Culver Kapetan): No appearances. Order to personally appear issued for Mr. Krbecheck.</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 05/16/2013	
Cont. from 071814, 081814	Final Inventory and Appraisal filed 11/06/2013 shows an estate valued at \$182,150.00.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Minute Order of 05/15/2014 set this status hearing for the filing of the First Account and/or Petition for Final Distribution.	
Aff.Mail	<p>Former Declaration of Randolph Krbecheck Regarding the Status of Action and Request for Continuance filed 08/11/2014 states he cannot attend the hearing set for 08/18/2014 because he is required to be in Redwood City at the same time for trial in a pending superior court action. The trial is set to commence on 08/11/2014. Attorney Krbecheck respectfully requests the court continue the hearing on this matter to the next available date.</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		
		Reviewed by: LV
		Reviewed on: 09/16/2014
		Updates:
		Recommendation:
		File 7A – Dupree

DOD: 09/01/2012	<p>JULIE RAVISCIONI, daughter was appointed Administrator with full IAEA authority without bond on 05/15/2013.</p> <p>Minute Order of 07/18/2014 (Judge Kristi Culver Kapetan): No appearances. Order to personally appear issued for Mr. Krbecheck.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 08/18/2014: Mr. Krbechek is in trial and requests a continuance.</p>	
Cont. from 081814			
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: 09/16/2014
	Updates:		
	Recommendation:		
	File 7B – Dupree		

Petition for Termination of Proceedings and Discharge of Personal Representative

DOD: 8-16-13	<p>MICHAEL D. COWIN and DANIEL RAY COWIN, Named Executors, are Petitioners.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont from 080414	<p>History: Decedent's will dated 3-19-04 devises his estate to his four surviving step-sons: Alvin Leon Cowin, Kenneth Paul Cowin, Michael Dale Cowin, and Daniel Ray Cowin, and nominates Michael Dale Cowin and Daniel Ray Cowin as co-executors.</p>	<p>1. <u>The progression of this estate is highly unusual. Need clarification:</u> Were there assets that were marshaled by Petitioners and distributed outside of probate? If so, how was it determined that they were not subject to probate?</p>
Aff.Sub.Wit.	<p>On 12-3-13, Michael Cowin filed a petition for probate requesting appointment of himself, alone, as executor.</p>	<p>It was originally alleged that there was approx. \$220,000 in personal property assets, the nature of which is unknown; however, the first mediation agreement refers to various accounts, policies, etc. The second mediation agreement indicates that Daniel was in possession of approx. \$21,000 that he was to distribute to his brothers.</p>
Verified	<p>At the hearing on 1-23-14, Daniel Cowin also appeared and the Court referred the two of them to mediation and continued the matter to 1-27-14.</p>	<p><u>This petition now states this is a "no-asset estate" but also refers to the mediation agreement(s).</u></p>
Inventory	<p>On 1-24-14, Michael filed a declaration that attached an agreement that the he and Daniel reached in mediation. The agreement dated 1-23-14 refers to exchange of information regarding various and numerous assets, and states they will work together as executors. Therefore, at hearing on 1-27-14, Michael's petition was denied, and the Court directed that an amended petition be filed.</p>	<p>There is no explanation of how it was determined that the assets were not subject to administration, and no explanation as to the discrepancy in the amounts.</p>
PTC	<p>On 2-11-14, Michael and Daniel together filed an amended Petition for Probate of Will and for Letters Testamentary as co-executors. The amended petition estimated that the estate contained approx. \$220,000.00 in personal property assets. Hearing was set for 3-13-14.</p>	<p>Probate estates are protective proceedings designed to ensure that all interested persons have been given notice, etc. This includes heirs and potential creditors of the decedent, as well as various governmental agencies, such as the Franchise Tax Board and the Dept. of Health Care Services. As such, there are various types of proceedings, and various steps required for each type.</p>
Not.Cred.	<p>On 3-10-14, Daniel filed a declaration that attached another agreement, apparently reached in mediation on 3-10-14. According to the agreement, mediation was attended by Michael Cowin, Daniel Cowin, and Bill Cowin. (Note: It is unclear who Bill Cowin is.). This agreement appears to require Daniel to distribute \$21,000 total, with interest, to Alvin, Kenneth, and Michael on a payment schedule.</p>	<p>In a probate estate, Court authorization is necessary before any distribution of assets. The mediation services that are available to litigants are not a substitute for the procedures required by law.</p>
Notice of Hrg	<p>SEE ADDITIONAL PAGES</p>	<p>Because Petitioners are not represented by legal counsel, Examiner brings up these details for the Court's consideration, even though the will was never admitted to probate and Letters never issued.</p>
Aff.Mail		<p>Reviewed by: skc</p>
Aff.Pub.		<p>Reviewed on: 9-16-14</p>
Sp.Ntc.		<p>Updates:</p>
Pers.Serv.		<p>Recommendation:</p>
Conf. Screen		<p>File 10A – Galvan</p>
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Page 2

The Minute Order from the hearing on 3-13-14 states: "The Court is advised that an agreement was reached during mediation. Petitioners to file a petition to close an estate with no assets." The matter was continued to 5-1-14.

There were no appearances at the continued hearing on 5-1-14. The Court continued the matter to 6-26-14 and also issued an Order to Show Cause for failure to appear.

On 6-26-14, Michael, Daniel, and William Cowin appeared. *(Again, it is unclear who William Cowin is.)*

The OSC was dismissed, and the matter was continued to 9-11-14 for the filing of the "amended petition."

Therefore, on 6-27-14, the instant petition was filed.

The petition states: "There is no property of any kind belonging to the estate and subject to administration; after probate mediation agreement." The petition requests that the Court terminate administration and discharge the personal representative.

Also filed with the petition are declarations from Alvin Leon Cowin, Kenneth Paul Cowin, Michael Dale Cowin, and Daniel Ray Cowin, confirming notice of the petition and the mediation agreement, and confirming their understanding that this is a "no asset estate."

Order to Show Cause Re: Petition for Termination of Proceedings and Discharge of Personal Representative

DOD: 8-16-13	<p>MICHAEL D. COWIN and DANIEL RAY COWIN filed an amended Petition for Probate on 2-11-14.</p> <p>After reaching various agreements in mediation regarding distribution of assets, the Petitioners filed a Petition for Termination of Proceedings, which was set for hearing on 8-4-14.</p> <p>Examiner Notes noted various issues with this estate, the mediation agreements filed, and the Petition for Termination of Proceedings.</p> <p>At the hearing on 8-4-14, there were no appearances and the Court issued this Order to Show Cause for the petitioners to be personally present to explain the request for termination of proceedings.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>See Page A for case history, details.</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 10B - Galvan	

Probate Status Hearing RE: Filing Blocked Account Receipt

	SANDRA BROWN is Trustee.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	On 8/18/14 the Court approved the sale of the real property for \$130,000 and order the proceeds of the sale into a blocked account.	<p>1. Need receipt for blocked account <u>or</u> 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>
<input type="checkbox"/> Aff.Sub.Wit.	<p>This status hearing was set for the filing of the receipt for blocked account.</p>	
<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: KT
		Reviewed on: 9/22/14
		Updates:
		Recommendation:
		File 11 - Eastwood

Age: 75 years	<p>TRACY CERDA was appointed conservator of the person and estate on 8/4/14 with bond set at \$12,760.00.</p> <p>This status hearing was set for the filing of the bond.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need bond of \$12,760.00 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		
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: 9/16/14
		Updates:
		Recommendation:
		File 13 - Andrade

Petition for Settlement and Approval of Trustee's Account

		HOWARD J. DEMERA , Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Please see related cases on pages 16 – 19.
		Petitioner states on 10/15/1993, JOSEPH F. DESMOND and EDNA F. DESMOND , as Settlers and Trustees, executed a Trust Agreement establishing the DESMOND FAMILY TRUST .	
Cont. from		EDNA F. DESMOND died on 6/9/1996 and by reason of her death the trust was divided in to the JOSEPH F. DESMOND SURVIVOR'S TRUST , the DESMOND MARITAL TRUST , the DESMOND GRANDCHILDREN'S TRUST and the DESMOND FAMILY TRUST .	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	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		
		After the death if EDNA F. DESMOND, JOSEPH P. DESMOND became and acted as sole Trustee of all the separate trusts and served as the sole Trustee until his death on 8/19/2007. Upon the death of JOSEPH F. DESMOND , petitioner HOWARD J. DEMERA , became Trustee of all of the trusts. This petition relates to and present's petitioner's accounting for his administration of the JOSEPH F. DESMOND SURVIVOR'S TRUST . Petitioners accounting is presented in two periods. Account period: 8/19/07 – 7/31/09 Accounting - \$15,395,615.71 Beginning POH - \$11,825,478.13 Ending POH - \$ 9,372,159.00 Account period: 8/1/09 – 11/16/11 Accounting - \$17,343,100.26 Beginning POH - \$ 9,372,159.00 Ending POH - \$0 Please see additional page	
			Reviewed by: KT
			Reviewed on: 9/16/14
			Updates:
			Recommendation:
			File 15 - Desmond

Wherefore, petitioner prays for an order of this Court:

1. Settling, allowing and approving the account and report of petitioner as Trustee as filed;
2. Confirming and approving all acts and proceedings of petitioner as Trustee.

	TEMP (ESTATE ONLY) EXPIRES 9-22-14	NEEDS/PROBLEMS/COMMENTS:
	VANCE SEVERIN and TERRI SEVERIN , Brother and Sister of Mr. Salzman's wife, Stacy Salzman, were appointed as Temporary Co-Conservators of the Person and Estate without bond (bond upon permanent appointment) on 9-25-12.	<p>1. Need first account 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 032913, 042613, 061413, 100413. 011014, 062314	At a hearing on 11-5-12, the Court set status hearing for the filing of the I&A for 3-22-13.	
Aff.Sub.Wit.	On 12-10-12, The Temporary Co-Conservators were authorized to sell the Conservatee's real property, with proceeds to be deposited into a blocked account.	
Verified	At hearing on 1-7-13, the petition for conservatorship of the <u>person</u> was withdrawn, and the conservatorship of the <u>estate</u> was extended to 3-29-13, but limited to the sale of the property and negotiate and settle with the Conservatee's creditors, including California Franchise Tax Board and IRS.	
Inventory	Also on 1-7-13, the Court set this status hearing for filing of the First or Final Account of Temporary Conservator.	
PTC	Note: I&A filed 5-22-13 indicates the Conservatee's 50% real property interest valued at \$75,000.00.	
Not.Cred.	Note: Per Status Report filed 5-7-14, escrow closed on 4-18-14.	
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 22 - Salzman

DOD: 10-7-12	<p>JOAN ST. LOUIS, Spouse, filed Petition for Assumption of Law Practice of David St. Louis on 9-6-13.</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p>
<p>Cont. from 111313, 112013, 010814, 022614, 052814</p>	<p>Background: Mrs. St. Louis' petition requested:</p>	<p>As of 3-25-14, a bond has been filed; however, no status report has been filed.</p>
Aff.Sub.Wit.	<p>1) That the Court assume jurisdiction over the law practice of David J. St. Louis and appoint attorney PAUL T. CHAMBERS to represent and assist the Court in assuming jurisdiction;</p>	<p>Note: Page B is the status hearing for filing of the accounting.</p>
Verified	<p>2) Allow Mr. Chambers to appoint himself as receiver and take possession and control of any and all bank accounts related to Mr. St. Louis' law practice, including the attorney-client trust account which contained \$54,502.09 at 3-31-13;</p>	<p>Note: There were no appearances on 5-28-14</p>
Inventory	<p>3) Coordinate with Allison St. Louis, former legal secretary, to determine the clients entitled to funds and the amounts each is owed;</p>	
PTC	<p>4) Upon determining the recipients and the amounts owed, that Mr. Chambers be allowed to issue checks to the recipients without further court order;</p>	
Not.Cred.	<p>5) Specifically, that Mr. Chambers be allowed, without further Court order, to issue checks from a certain estate account (John K. Shirin Estate) to those recipients entitled thereto; and</p>	
Notice of Hrg	<p>6) Upon completion, provided accounting.</p>	
Aff.Mail	<p>Non-Opposition to Petition was filed 9-30-13 by the State Bar of California.</p>	
Aff.Pub.	<p>A Creditor's Claim and Request for Special Notice was filed 9-30-13 by Attorney J. Patrick Sullivan, who represents Walter Wentz, Creditor.</p>	<p>Reviewed by: skc</p>
Sp.Ntc.	<p>Limited Opposition to Petition was filed 10-9-13 by BIANCA SORIA. Ms. Soria states she was a client of Mr. St. Louis, who was wired \$65,000.00 in connection with a settlement. Ms. Soria requested that as a condition to granting the petition, that the Court direct Mr. Chambers to distribute the funds to her, or to post appropriate bond.</p>	<p>Reviewed on: 9-16-14</p>
Pers.Serv.	<p>At hearing on 10-16-13, the Court granted the petition with additional orders and set this status hearing. See Page 2 for specifics.</p>	<p>Updates:</p>
Conf. Screen	<p>Subsequent to the hearing, both attorneys David Roberts and Donald Cram submitted competing proposed orders.</p>	<p>Recommendation:</p>
Letters	<p>Therefore, the Court will address the competing proposed orders at this status hearing.</p>	<p>File 23A – St. Louis</p>
Duties/Supp	<p>SEE ADDITIONAL PAGES</p>	
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Page 2

Minute Order 10-16-13: Mr. Cram is appearing via CourtCall on behalf of Bianca Soria. The Court accepts Mr. Roberts representation that Attorney Timothy Magill has been given notice. The Court finds that Patrick James' client has been properly served. The Court will allow the interlineation under 9764. The Court grants the petition and waives bond. The Court orders that the \$41,155.89 be paid within 30 days. The Court notes that there are no funds to pay Attorney Chambers and he is acting in pro bono. Matter set for Status Hearing on 11/13/13. If everything is completed by 11/13/13, no appearances will be necessary. Set on 11/13/13 at 9am in Dept 303 for Status Hearing.
Additional hearing dates 3/6/14 at 9am Dept 303 for Status Re Accounting;
Petition is granted; Order to be signed ex parte.

Attorney David A. Roberts submitted a proposed Order that contains orders as follows:

1. Granting the petition that the Court assume jurisdiction over the law practice, including, but not limited to, dispersing [sic] funds held in the attorney-client trust account;
2. Appointing Paul T. Chambers to represent and assist the Court in assuming jurisdiction over the law practice without bond and shall receive no compensation;
3. That Mr. Chambers coordinate with Allison St. Louis to determine the clients entitled to files, documentation, and/or funds and the amounts each is owed;
4. That the amount that Mr. Chambers finds due to Ms. Soria shall be paid within 30 days from the entry of this order without further Court order;
5. That Mr. Chambers be allowed to appoint himself receiver and take possession of the various accounts and have signature power over such accounts, including that certain account fbo John K. Shirin or his heirs;
6. That after determining the recipients of the files, documents, and money, and the amount thereof, that Mr. Chambers is given the authority to disburse such without further Court order;
7. That Mr. Chambers is authorized without further Court order to issue checks from the John K. Shirin account to those recipients entitled thereto;
8. That upon completing the foregoing tasks, Mr. Chambers provide an accounting, upon approval of which he shall be discharged; and
9. That Mr. Chambers inform the Court of any other action taken as the Court's representative;
10. Setting hearing for approval of the final account on 3-6-14.

Attorney Donald H. Cram submitted an Alternate proposed Order that includes, in addition to the above orders, that Mr. Chambers shall disburse no less than \$41,155.89 to Ms. Soria within 30 days without further Court order.

Note: Per Minute Order 2-26-14, bond of \$47,000.00 was required. Bond was filed 3-17-14. No further status report or accounting has been filed.

Note: The Court had originally set status hearing for 3-6-14 for the filing of the accounting. On 3-6-14, that status hearing was continued with this status hearing. See Page B.

Update: The Order for Court Assumption of the Law Practice of David J. St. Louis, Deceased, and Appointing Paul T. Chambers Practice Administrator with Related Powers of Administration was signed on 3-26-14. An Amended Order was apparently signed by the Court 5-14-14, which included specific distribution relative to the Shirin Estate, although this matter is not specifically before the Court.

However, there were no appearances at this Status Hearing or at the related Status Hearing Re Accounting on 5-28-14 and the matter was continued to 6-25-14.

Note: The amended order was apparently submitted to the Court ex parte for signature. \$60.00 is due.

Status Hearing Re: Filing of Accounting of the Practice Administrator

	DAVID J. ST. LOUIS , an attorney, passed away 10-7-12.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 3-6-14, 3-26-14, 5-28-14</u></p> <p>1. Need account or <u>verified written status report</u> pursuant to local rules.</p>
	On 10-16-13 , pursuant to the petition of JOAN ST. LOUIS , Attorney PAUL T. CHAMBERS was appointed as Practice Administrator pursuant to Probate Code §9764 without bond.	
	At the hearing on 10-16-13, the Court set this status hearing for the filing of a final accounting by the Practice Administrator pursuant to Probate Code §9764(h).	
Cont. from 030614, 032614, 052814		
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 23B – St. Louis

DOD: 2-2-01	BARBARA MORRIS, Spouse, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 8-18-14. As of 9-16-14, nothing further has been filed.</u>
	Petition is incomplete.	
Cont from 081814		<u>Need amended petition based on the following:</u>
Aff.Sub.Wit.		1. The petition is blank at #4c – intestate or will?
Verified		2. The petition is blank at #6 at #9. Was the decedent survived by any other relatives?
Inventory		3. The petition is blank at #7 and does not contain an attachment regarding what property Petitioner is requesting to be determined to pass to her.
PTC		4. The petition is blank at #12. Need verification that a petition for probate is not being filed (#12c).
Not.Cred.		5. Petitioner does not state any facts necessary to make a determination of property passing to her as spouse. When were Petitioner and Decedent married? When was the property acquired? How was the property acquired? Any other details relevant pursuant to Probate Code §13651.
Notice of Hrg		6. This petition was filed with a fee waiver. If property is determined to pass to Petitioner, the filing fee of \$435.00 will be due.
Aff.Mail		Reviewed by: skc
Aff.Pub.		Reviewed on: 9-16-14
Sp.Ntc.		Updates:
Pers.Serv.		Recommendation:
Conf. Screen		File 26 – Morris
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		