



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 Lillian Salwasser (Estate)

Case No. 07CEPR00104

Atty Matthai, Edith (for Craig A. Houghton – Objector)

Atty Manock, Charles K. (for George Salwasser/Executor of the Estate of Lillian Salwasser)

Atty Chiepegian, Michael S (for Marvin Salwasser/Administrator with Will Annexed of Walter Respondent)

Salwasser

Atty Wright, Janet L. (for George Salwasser/Executor)

Atty Farley, Michael L. (of Visalia, for Gary E. Salwasser - Beneficiary)

Status Hearing

	George Salwasser is Executor.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 6-7-13: Ms. Wright advises the Court that she has a petition drafted. Continued to 8-9-13.</p> <p>Minute Order 8-9-13: Counsel requests continuance. Continued to 10-4-13.</p> <p>Status Report filed 8-7-13 states an amended tax return is being prepared and will be submitted to the IRS upon completion by Craig Houghton of Baker Manock & Jensen. At this time, Mr. Houghton is still not in possession of sufficient information in regards to the amended tax matters to provide Ms. Wright with the information needed to close the estate. It is requested that the status hearing be continued to 10-4-13.</p> <p>1. Need amended account / petition for final distribution.</p>
	An Amended and Restated First Account was filed on 1-13-10 and has been continued with reference to additional ongoing matters in this and other related cases.	
	This status hearing was set on 4-26-13.	
	Status report filed 6-6-13 by Attorney Janet Wright states counsel met and conferred on 5-16-13 with attorneys Craig Houghton and Mark Poochigian of Baker Manock & Jensen, who represented the Executor in his initial appointment through December 2008, and in various extraordinary matters, and with Executor, to review the proposed Petition for Final Distribution on Waiver of Account.	
	It was determined that in order to close the estate pursuant to the Memorandum of Settlement Agreement entered into by beneficiaries Gary Salwasser and George Salwasser after mediation, certain matters would need to be addressed:	
	<ol style="list-style-type: none"> 1. Amendment to estate tax return 2. Inventory and Appraisal for promissory notes (preliminary payment history attached) 	
	Once the amendment to the estate tax return is completed, it should be possible to create a formula taking into account the allocation of fees and costs pursuant to the agreement and any credits due beneficiaries which would allow the petition to be filed and estate to be closed.	
	Counsel is developing a draft formula and will meet and confirm with counsel for Gary Salwasser as well as Baker Manock & Jensen. If a formula cannot be agreed upon, the Petition will be filed specifying the areas of dispute.	
Cont. from 060713,080913		
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Citation		
FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 9-30-13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1 – Salwasser</p>

Probate Status Hearing Re: Filing First Account or Final Distribution

Cont. from		
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	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
NEEDS/PROBLEMS/COMMENTS:		
OFF CALENDAR. Order for Final Distribution signed on 9/20/13.		
Reviewed by: KT		
Reviewed on: 9/30/13		
Updates:		
Recommendation:		
File 3 - Barnes		

Probate Status Hearing Re: First Accounting or Petition for Final Distribution

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR. Order for Final Distribution signed on 4/29/13.</p>
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Aff.Sub.Wit.		
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FTB Notice		
		Reviewed by: KT
		Reviewed on: 9/30/13
		Updates:
		Recommendation:
		File 5 - Lee

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

DOD: 6-9-11	<p>JANETTE COURTNEY, was appointed Executor with Full IAEA without bond and Letters issued on 9-15-11.</p> <p>Inventory and Appraisal Partial No. 1 filed 2-13-13 included commercial real property valued at \$250,000.00, which was sold pursuant to Order Confirming Sale of Real Property.</p> <p>At hearing on 2-25-13, the Court set status hearing for 4-8-13 for the filing of the Final Inventory and Appraisal, filing of the first account, and/or petition for final distribution.</p> <p>The status hearing for filing of the final Inventory and Appraisal has been continued to 6-28-13 and now 7-26-13.</p> <p>Status Report filed 7-19-13 states:</p> <ul style="list-style-type: none"> • Petitioner has performed all required duties as personal representative • All known debts have been paid except for mortgage on real property which has a market value below the mortgage amount • All administration costs to date except for compensation to the personal representative and attorney have been paid • The estate is solvent • A creditor's claim filed by Steven Drummond has been rejected • There is currently no pending litigation involving the estate; however, there is a potential claim against beneficiaries for recovery of a vehicle and reimbursement for sales tax paid • The status of a business being operated by a beneficiary, and the estate's current interest therein, has yet to be determined/negotiated. • It is estimated that an additional three (3) months will be needed to complete administration of the estate, unless litigation is needed to recover the vehicle. • Petitioner requests authority to continue administration until 10-1-13. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 4-8-13: Mr. Keeler and Mr. Ivy are appearing via conference call. Mr. Ivy is directed to file a fully executed agreement with the court. Matter is set for Status Hearing on 5/24/13 regarding the settlement agreement and the dismissal. If the agreement and dismissal are filed by 5/24/13, no appearance will be necessary. The status hearing regarding the inventory and appraisal is continued to 6/28/13 for appearance by Mr. Neilson only. Set on 5/24/13 @ 9:00 a.m. Dept. 303 for: Status Hearing Re: Settlement Agreement and Dismissal</p> <p>Note: Full and Complete Settlement Agreement and Mutual Release of All Claims filed 4-11-13, and dismissal of petition filed by Dennis L. Thomas on 12-19-11 was entered on 5-1-13.</p> <ol style="list-style-type: none"> 1. Need Final I&A. 2. Need First Account or Petition for Final Distribution pursuant to Probate Code §12200.
Cont. from 040813, 062813, 072613		
Aff.Sub.Wit.		
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FTB Notice		
Reviewed by: skc		
Reviewed on: 9-30-13		
Updates:		
Recommendation:		
File 8 - Drummond		

Probate Status Hearing Re: Filing of Receipt for Blocked Account

Age: 74	TEMP (ESTATE ONLY) EXPIRES 10-4-13	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.	<u>Continued from 3-22-13, 4-26-13</u>
	At a hearing on 11-5-12, the Court set this status hearing for the filing of the I&A.	Status Report (unverified) filed 4-23-13 by Attorney Molsenbocker states there were issues with repairs and other matters that have delayed sale, but the parties are hopeful that the house will be sold in the next 30-60 days. The inventory is in process and will be filed shortly, the only asset being the Conservatee's joint tenancy interest in the house. The only new occurrence is that the Conservatee recently had "another" stroke for which he was hospitalized for a short time. He was returned home and is now an "outpatient only." The Co-Conservators request that the Court extend the temp letters to the next hearing date and such other and further orders that the Court considers just and proper.
Cont. from 032213,042613,06141 3	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.	Note: Post-Move Notice of Change of Residence of Conservatee filed 5-22-13 indicates that Mr. Salzman was moved to Leisure Village in Camarillo, CA, as of 3-4-13.
Aff.Sub.Wit.	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.	1. Need receipt for blocked account (sale proceeds).
Verified	Also on 1-7-13, the Court set this status hearing for filing of the First or Final Account of Temporary Conservator.	Reviewed by: skc
Inventory	Status Report filed 3-21-13 by Attorney Molsenbocker (unverified) states that at this time due to unforeseen circumstances and complications the house has not sold. There have been issues with repairs and other matters which have delayed sale. The parties are hopeful that in the next 30 days the house will sell. There are no funds to deposit to blocked account since the house has not sold. I&A has not been filed as the Co-Conservators were under the impression that this matter would be terminated by now. Since that has not happened, the only asset to be inventoried is the Conservatee's joint tenancy interest in the house. The Co-Conservators request a short extension to file I&A.	Reviewed on: 9-30-13
PTC	Inventory and Appraisal filed 5-22-13 reflects Mr. Salzman's 50% interest in the real property valued at \$75,000.00.	Updates:
Not.Cred.	Status Report filed 6-12-13 states the house has been on the market for 20 days listed at \$417,000.00. It has been completely rehabilitated and looks terrific. There are some issues with the contractor who did the rehabilitation that will need to be worked out once a solid offer is received. The Co-Conservators and spouse are hopeful that an offer will be made soon and are considering adjusting the listing price downward.	Recommendation:
Notice of Hrg	The Co-Conservators request temporary conservatorship be extended 60-90 days to complete their limited powers to sell the house, place the money in a blocked account, and file their first and final account.	File 13A - Salzman
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Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Age: 74	<p>TEMP (ESTATE ONLY) EXPIRES 10-4-13</p> <p>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> <p>At a hearing on 11-5-12, the Court set status hearing for the filing of the I&A for 3-22-13.</p> <p>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.</p> <p>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.</p> <p>Also on 1-7-13, the Court set this status hearing for filing of the First or Final Account of Temporary Conservator.</p> <p>Note: I&A filed 5-22-13 indicates the Conservatee's 50% real property interest valued at \$75,000.00.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 3-29-13, 4-26-13</u></p> <p><u>Minute Order 3-22-13:</u> Mr. Molsenbocker requests a continuance to file the inventory. Matter continued to 4/26/13. At the request of both counsel, the hearing scheduled for 3/29/13 is vacated and rescheduled for 4/26/13.</p> <p><u>Status Report (unverified) filed 4-23-13 by Attorney Molsenbocker</u> states there were issues with repairs and other matters that have delayed sale, but the parties are hopeful that the house will be sold in the next 30-60 days. The inventory is in process and will be filed shortly, the only asset being the Conservatee's joint tenancy interest in the house. The only new occurrence is that the Conservatee recently had "another" stroke for which he was hospitalized for a short time. He was returned home and is now an "outpatient only." The Co-Conservators request that the Court extend the temp letters to the next hearing date and such other and further orders that the Court considers just and proper.</p> <p>Note: Post-Move Notice of Change of Residence of Conservatee filed 5-22-13 indicates that Mr. Salzman was moved to Leisure Village in Camarillo, CA, as of 3-4-13.</p> <ol style="list-style-type: none"> Need receipt for blocked account (sale proceeds) Need account.
DOB: 2-15-39		
Cont. from 032913, 042613, 061413		
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	Reviewed on: 9-30-13	
	Updates:	
	Recommendation:	
	File 14B - Salzman	