



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 Chielpegian, Michael S (for Marvin Salwasser/Administratoor 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

	<p>George Salwasser is Executor.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
<p>Cont. from 060713,080913</p>	<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.</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>Aff.Sub.Wit.</p>	<p>This status hearing was set on 4-26-13.</p>	<p>Minute Order 8-9-13: Counsel requests continuance. Continued to 10-4-13.</p>
<p>Verified</p>		
<p>Inventory</p>		
<p>PTC</p>	<p>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.</p>	
<p>Not.Cred.</p>		
<p>Notice of Hrg</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>Aff.Mail</p>		
<p>Aff.Pub.</p>		
<p>Sp.Ntc.</p>		
<p>Pers.Serv.</p>		
<p>Conf. Screen</p>	<p>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:</p>	
<p>Letters</p>	<ol style="list-style-type: none"> 1. Amendment to estate tax return 2. Inventory and Appraisal for promissory notes (preliminary payment history attached) 	<p>1. Need amended account / petition for final distribution.</p>
<p>Duties/Supp</p>		
<p>Objections</p>		
<p>Video Receipt</p>		
<p>CI Report</p>		
<p>9202</p>		
<p>Order</p>	<p>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.</p>	
<p>Aff. Posting</p>		<p>Reviewed by: skc</p>
<p>Status Rpt</p>		<p>Reviewed on: 9-30-13</p>
<p>UCCJEA</p>		<p>Updates:</p>
<p>Citation</p>		<p>Recommendation:</p>
<p>FTB Notice</p>	<p>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.</p>	<p>File 1 – Salwasser</p>

	<p>CHRISTINE ADAMS is the current Trustee.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>			
	<p>Order dated 8/13/13 allowed Christine Adams to add \$603,639.16 to the trust from the estate of Barbara Scharton estate.</p>	<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>			
<p>Cont. from</p>	<p>Minute order dated 8/12/13 set this status hearing for the filing of the first account.</p>				
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File 2 - Fulbright					

4 Edward Uribe Medina (Estate)

Case No. 12CEPR00470

Atty Perez, Holley H (For Executor Susan K. Medina)

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

DOD: 2/25/2011	<p>SUSAN K. MEDINA was appointed executor with full IAEA authority and without bond on 7/31/12.</p> <p>Letters issued 8/14/13.</p> <p>Inventory and appraisal, partial no. 1 filed on 1/9/13 showing a value of \$173,000.00</p> <p>Verified Status Report filed on 9/25/13 states the 2012 income taxes are in the process of being prepared. It is anticipated that the petition for final distribution will be filed within the next 2 to 3 months.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Inventory and Appraisal filed on 1/9/13 states it is a partial inventory. Need final inventory. Inventory and Appraisal filed on 1/9/13 includes 3 parcels of vacant land that were not appraised. 	
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			<p>Reviewed by: KT</p>
			<p>Reviewed on: 9/30/13</p>
	<p>Updates:</p>		
	<p>Recommendation:</p>		
	<p>File 4 - Medina</p>		

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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		Reviewed by: KT
		Reviewed on: 9/30/13
		Updates:
		Recommendation:
		File 5 - Lee

DOD: 10/3/1994	<p>ROBERT L. JOHNSON was appointed Administrator without bond and with Limited IAEA authority on 7/31/12.</p> <p>Letters issued 7/31/12.</p> <p>I & A filed on 9/11/12 shows an estate valued at \$40,000.00</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Need first account, 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>	
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			<p>Reviewed by: KT</p> <p>Reviewed on: 9/30/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6 - Johnson</p>

Atty Sanoian, Joanne

Atty Sharbaugh, Catherine

Status Hearing Re: Confirmation of Receipt of Transfer

Age:			<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u></p> <p>Receipt of transfer by Tulare County Superior Court was filed 8-15-13.</p>				
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File 7 – Bideaux							

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		
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Citation		
FTB Notice		

Atty Pimentel, Paul J.

Atty Kruthers, Heather H

Status Hearing Re: Filing of the First Account

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u></p> <p>First account was settled on 7-2-13.</p>
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		Reviewed by: skc
		Reviewed on: 9-30-13
		Updates:
		Recommendation:
		File 9 - Soto

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

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Order for Final Distribution was entered 8-13-13.	
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		File 11 - Govier	

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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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		
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 on: 9-30-13	
	Updates:	
	Recommendation:	
	File 14B - Salzman	

DOD:11-26-11		<p>JOCELYN ALSDORF, Daughter, was appointed as Administrator with Will Annexed with Full IAEA without bond on 5-1-13.</p> <p>On 5-1-13, the Court set this status hearing for filing the Inventory and Appraisal.</p> <p>Inventory and Appraisal Partial No. 1 was filed 5-22-13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Final I&A or verified written status report.</p>	
Aff.Sub.Wit.				
Verified				
Inventory				
PTC				
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Notice of Hrg				
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Aff.Pub.				
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Letters				
Duties/Supp				
Objections				
Video Receipt				
CI Report				
9202				
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Aff. Posting				
Status Rpt				
UCCJEA				
Citation				
FTB Notice				
				Reviewed by: skc
				Reviewed on: 9-30-13
				Updates:
				Recommendation:
		File 15 - Alsdorf		

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> I&A filed 7-30-13
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	
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<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: skc
		Reviewed on: 9-30-13
		Updates:
		Recommendation:
		File 16 - Gross

Status Hearing Re: Confirmation of Receipt of Transfer

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Receipt of transfer by Tulare County Superior Court was filed 8-26-13.
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: skc
		Reviewed on: 9-30-13
		Updates:
		Recommendation:
		File 18 - Bernal

Status Hearing Re: Filing of Petition for Distribution

DOD: 10/11/10		<p>KARLA DEAN, daughter, was appointed Administrator with Limited IAEA Authority, without bond on 12/13/12. Letters of Administration were issued on 01/15/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p style="text-align: center;">Public Administrator was appointed successor administrator by the Court on 06/18/13. Minute Order from hearing on 09/06/13 continued a status hearing for the filing of the Public Administrator's Final Account to 01/10/14</p>
Cont. from 040513			
Aff.Sub.Wit.		<p>Minute Order from Status Hearing on 01/25/13 set this matter for status re filing of the Petition for Distribution on 04/05/13.</p>	
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: JF			
Reviewed on: 10/01/13			
Updates:			
Recommendation:			
File 19 - Johnson			

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

DOD: 12-3-11		<p>JAMES RAY WATKINS, Son, was appointed as Executor with Full IAEA without bond on 7-31-12.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution or verified written status report.</p>
		<p>On 7-31-12, the Court set this status hearing for filing the first account or petition for final distribution.</p>	
		<p>Inventory and Appraisal filed 3-19-13 indicated a total estate value of \$60,500.00 consisting of real and personal property.</p>	
Aff.Sub.Wit.			
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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: skc	
		Reviewed on: 9-30-13	
		Updates:	
		Recommendation:	
		File 20 - Watkins	

DOD: 5-18-12	<p>HENRY T. PEREA, Son, was appointed Executor with Full EAEA without bond on 8-2-12.</p> <p>On 8-2-12, the Court set this status hearing for filing of the first account or petition for final distribution.</p> <p>Final Inventory and Appraisal filed 11-13-12 reflected a total estate value of \$142,500.00 consisting of real property and a vehicle.</p> <p>Verified Status Report filed 9-25-13 states the encumbrance on the residence exceeds its value. Executor proposes to sell the home via short sale. The estate also has numerous creditor's claims including claims by the IRS and California Franchise Tax Board. Upon the sale of the residence, Executor will prepare his final report and petition.</p> <p>Executor requests an additional six months to complete the sale and file.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution.</p>
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PTC		
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Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
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Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
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Aff. Posting		
Status Rpt		
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Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 9-30-13
		Updates:
		Recommendation:
		File 21 – Trevino

DOD: 12/22/1997	<p>LISA BOWIE was appointed as Executor with Full IAEA authority and without bond on 9/11/01.</p> <p>Letters issued on 9/11/01.</p> <p>Inventory and appraisal was due on 1/11/02.</p> <p>First account or petition for final distribution was due on 9/11/02.</p> <p>Notice of Status Hearing was mailed to attorney David Knudson on July 31, 2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need inventory and appraisal and 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>
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Video Receipt		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 10/1/13
		Updates:
		Recommendation:
		File

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 9/23/2013 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. Petitioner requests additional time to file the final report and petition to close the estate. The time requested in 6 months from the filing of this status report. Petitioner, Arthur Roth lives in New York. It would be extremely costly, time consuming and difficult for him to appear at the status hearing. For these reasons, Petitioner requests that he be excused from personally attending the status conference as ordered by the Notice of Status Hearing.</p>	NEEDS/PROBLEMS/COMMENTS:		
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Objections				
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UCCJEA				
Citation				
FTB Notice				
			Reviewed by: KT	
			Reviewed on: 10/1/2013	
			Updates:	
		Recommendation:		
		File 23 - Roth		

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

Age:		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Inventory and appraisal filed on 9/17/13. Petition for Final Distribution filed and set for hearing on 10/23/2013.
DOD:		
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Inventory		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 10/1/2013
		Updates:
		Recommendation:
		File 24 - Pardini

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: 7/2/2001	<p>VERNETTE A. FRIESEN was appointed Special Administrator on 12/28/2001 for the sole purpose of disclaiming the decedent's interest in the Trust created under the Will of John Hild.</p> <p>Letters issued on 12/28/2001 and had no expiration date.</p> <p>Notice of Status Hearing was mailed to attorney Michael Buettner on 7/31/2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need petition to close the estate 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>
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Objections		
Video Receipt		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: KT		
Reviewed on: 10/1/2013		
Updates:		
Recommendation:		
File 25 - Hild		

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: 6-7-01	<p>RICHARD HICKMAN was appointed Executor with Full IAEA without bond and Letters issued on 3-19-02.</p> <p>According to file documents, the sole asset of the estate was an account containing approx. \$65,000.00; however, no Inventory and Appraisal was filed, and no account or petition for final distribution was filed.</p> <p>On 7-31-13, the Court set this status hearing for failure to file an Inventory and Appraisal and failure to file an account or petition for final distribution. Notice was mailed to Attorney Patricia Carrillo.</p> <p>On 9-24-13, Attorney Carrillo filed a status report stating that in 2003, he office received a letter from Attorney Thom Snyder (attached) indicating that his office was substituting in as attorney for Executor and demanding a copy of the file. Ms. Carrillo replied with copies as well as a billing statement. Mr. Snyder's reply demanded that she sign the Substitution of Attorney (attached, last signature dated 4-15-03, but not filed). Since her last communication with Attorney Thom Snyder on 4-15-03, Ms. Carrillo has not had any written or verbal communication with Executor or Mr. Snyder or any of the beneficiaries. Ms. Carrillo has not made any formal demands for payment of attorney fees or reimbursement of costs.</p> <p>Attorney Carrillo states that upon receipt of the Notice of Status Hearing, she emailed Attorney Snyder, but received a response that states his practice is closed as he is now with the Kings County District Attorney's Office, and he has not had contact with any of the parties in many years. Ms. Carrillo then mailed a copy of the Notice of Status Hearing to the Executor, Richard Hickman, and to date have not received any response. She has made several attempts via internet and telephone to contact him and the other parties, but has not been able to reach anyone.</p> <p>Attorney Carrillo states that it is her belief that the bank account was liquidated outside of the probate proceeding and the beneficiaries were given their fair distributions. Prior to filing the petition for probate, interfamily disputes had prohibited the beneficiaries from liquidating the account and had caused the initial filing of the probate case. The disputes continued the year after the petition for probate was granted, making it impossible to proceed with the filing of the required court documents. There is no evidence that there are any outstanding costs or expenses.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Attorney Carrillo is still the attorney of record in this case, as the Substitution of Attorney was never filed.</p> <p>Note: Pursuant to Decedent's Will, there are eight (8) heirs to the estate.</p> <p>Note: A Request for Special Notice was filed by two of the heirs, James R. Elerick, Ph.D., and Debra Jean Elerick, c/o Law Office of Rodney C. Haron, on 3-19-02.</p> <ol style="list-style-type: none"> 1. Need Inventory and Appraisal. Probate Code §8900. 2. Need petition for final distribution. Probate Code §12200. 3. File documents reference an "embezzlement issue." The Court may require clarification. <p>Reviewed by: skc</p> <p>Reviewed on: 10-1-13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 26 - Elerick</p>
Aff.Sub.Wit.		
Verified		
Inventory		
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Notice of Hrg		
Aff.Mail		
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Duties/Supp		
Objections		
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CI Report		
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Status Rpt		
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Citation		
FTB Notice		

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: 1/6/1997	<p>VALERIE YOUNGER, was appointed as Administrator with full IAEA authority and without bond on 2/5/2002.</p> <p>Letters issued on 2/5/2002.</p> <p>Inventory and appraisal was due 6/5/2002.</p> <p>First account or petition for final distribution was due 2/5/2003.</p> <p>Notice of Status Hearing was mailed to Valerie Younger on 7/31/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need inventory and appraisal, 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>
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Status Rpt		
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Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 10/1/2013
		Updates:
		Recommendation:
		File 28 - Applewhite

Probate Status Hearing for failure to file the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution.

DOD: 4/29/2001	<p>DANIEL IRISSARRI was appointed Executor with full IAEA authority and without bond on 3/5/2002.</p> <p>Letters issues 3/5/2002</p> <p>I & A filed on 3/22/2004 showing an estate valued at \$160,773.11.</p> <p>First account or petition for final distribution was due 3/5/2003.</p> <p>Notice of Status Hearing was mailed to attorney Jeff Shepard on 7/31/2013.</p> <p>Status Report filed on 7/26/2013 states the Executor informed Mr. Shepard that he will appear at the hearing pursuant to the Notice of Status Hearing sent to him.</p> <p>The Executor has informed Mr. Shepard that he will provide him with the information necessary to close the estate.</p>	NEEDS/PROBLEMS/COMMENTS:				
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Aff.Sub.Wit.						
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PTC						
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FTB Notice						
	<table border="1"> <tr> <td>Reviewed by: KT</td> </tr> <tr> <td>Reviewed on: 10/1/2013</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 29 – Irissarri</td> </tr> </table>	Reviewed by: KT	Reviewed on: 10/1/2013	Updates:	Recommendation:	File 29 – Irissarri
Reviewed by: KT						
Reviewed on: 10/1/2013						
Updates:						
Recommendation:						
File 29 – Irissarri						

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

DOD: 12/17/1999	<p>MARK COPPEDGE was appointed as Executor with full IAEA authority and without bond on 4/10/2002.</p> <p>Letters issued on 4/11/2002.</p> <p>Inventory and Appraisal was due on 8/11/2002.</p> <p>First account or petition for final distribution was due 4/11/2003.</p> <p>Notice of Status Hearing was mailed to David Silva on 7/31/13.</p> <p>Verified Status Report of David Silva filed on 9/27/2013 states he was the attorney representing Mr. Coppedge. Mr. Silva states after his inability to connect with Mr. Coppedge to wrap up this matter in the latter part of 2002, he learned of his deteriorating physical condition was due to an illness he battled for the next three years. When he learn of his situation he wrote to Mr. Coppedge explaining that he would assist him in obtaining new counsel. Mr. Silva states he received no response from him.</p> <p>When the State Bar declared Mr. Silva ineligible to practice law, Mr. Silva states he sent him his original documents along with a letter informing him of his declared inability to practice law. Mr. Silva states he did not receive a response.</p> <p>Through the Fresno County Bar Association's Attorney Referral Service, Mr. Silva states he attempt6ed to secure the names of probate lawyers to transition this matter. Mr. Silva was informed they no longer provide names of attorneys.</p> <p>Mr. Silva hopes to have made progress in securing an attorney for Mr. Coppedge by the date of the status hearing.</p>	NEEDS/PROBLEMS/COMMENTS:
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Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
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Notice of Hrg		
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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: 10/1/2013
		Updates:
		Recommendation:
		File 30 - Coppedge

Probate Status Hearing Re: Failure to File First Account or Petition for Final Distribution

DOD: 06/22/07	<p>LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>Notice of Status Hearing filed 11/28/12 set this matter for status. Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Larry A. Donaldson on 10/19/12.</p> <p>Declaration of Beneficiary Laura Leonard re Probate Status Hearing – Failure to File First Account or Petition for Final Distribution filed 01/13/11 states: she and her brother (both beneficiaries of the estate) have made many written and verbal requests to Mr. Donaldson requesting an accounting and for their father's estate be brought to a close. Ms. Leonard states that Mr. Donaldson has ignored their requests and repeatedly failed to communicate with them regarding the estate. Ms. Leonard and her brother had an attorney, Frederick Borges, contact Mr. Donaldson on their behalf to request that he move forward with the estate. Mr. Donaldson responded that he would move forward, but has failed to do so. Ms. Leonard states that she and her brother have also made a complaint to the state bar of California regarding Mr. Donaldson's failure to act. Ms. Leonard states that after all of these efforts, Mr. Donaldson recently provided them with a sloppy, incomplete "accounting", however several years' worth of information is absent and many of the transactions are questionable. Declarant further states that she and her brother were supposed to receive a distribution in early January, but have not received anything.</p> <p>Inventory & Appraisal, partial no. 1 filed 07/24/13 - \$1,619,273.76</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 07/26/13 Minute order from 07/26/13 states: Mr. Donaldson advises the Court that he filed a status statement yesterday. He further advises that the accounting is being done however he may have a conflict which may require another attorney to complete the work in this matter. The Court on its own motion accepts Mr. Donaldson's withdrawal as Executor in this matter and appoints the Public Administrator. Mr. Donaldson is directed to contact Ms. Kruthers.</p> <p>Note: Letters of Administration were issued to the Public Administrator on 08/01/13.</p> <p>As of 10/01/13, the following remains outstanding:</p> <ol style="list-style-type: none"> 1. Need Final Inventory & Appraisal. 2. Need Accounting and/or Petition for Final Distribution.
Cont. from 012513, 032913, 042613, 072613		
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> 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		