



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) Eighth and Final Account and (2) Report of Conservator and (3) Petition for Allowance of Compensation to Conservator, Attorneys' Fees and Costs, (4) Delivery of Assets and (5) Termination of Conservatorship

DOD: 11/30/12		BARBAR BIGELOW , Conservator, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petitioner requests to distribute the remaining assets in the conservatorship estate pursuant to Probate Code § 13000. Therefore need affidavit from each person entitled to distribution.</p>
		Account period: 03/01/11 – 07/31/13	
		Accounting - \$155,931.63	
		Beginning POH - \$13,693.18	
		Ending POH - \$18,888.48	
Cont. from		Conservator - \$840.00	
<input type="checkbox"/>	Aff.Sub.Wit.	Attorney - \$1,123.59	
<input checked="" type="checkbox"/>	Verified	(\$1,005.00 for this accounting period (2.75 hrs. @ \$300/hr. and 1.5 hrs. @ \$120/hr.) plus \$118.59 previously approved unpaid fees from previous accounting period)	
<input type="checkbox"/>	Inventory	Costs - \$513.00 (filing fees, courtcall)	
<input type="checkbox"/>	PTC	Reserve - \$800.00 (for preparation of final tax returns)	
<input type="checkbox"/>	Not.Cred.	Petitioner requests to distribute the remaining assets pursuant to Probate Code § 13000, as follows:	
<input checked="" type="checkbox"/>	Notice of Hrg	Barbara Bigelow - \$5,203.96	
<input checked="" type="checkbox"/>	Aff.Mail w/	Dianne Andrews - \$5,203.96	
<input type="checkbox"/>	Aff.Pub.	Roger Peterson - \$5,203.96*	
<input type="checkbox"/>	Sp.Ntc.	*Roger Peterson suffers from disabilities, the conservator requests permission to distribute the share allocated for Roger Peterson to the Barbara Bigelow as trustee of a special needs trust established for his benefit under the conservatee's living trust.	
<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 checked="" type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620(c)		
<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: JF
			Reviewed on: 10/04/13
			Updates:
			Recommendation:
			File 1 - Peterson

(1) Second Account and Report of Conservator, (2) Petition for Settlement, (3) Reimbursement for Mileage, (4) Commissions and Fees to Conservator and Attorney

Age: 58 years	BRYAN JENSEN , Conservator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order dated 10/2/13 states the court allows the \$25.00 per hour fee. Counsel is ordered to prepare a declaration.</p> <p>1. Disbursement schedule shows a payment to Shepard, Shepard and Janian on 4/21/11 in the amount of \$462.59 without stating the nature and purpose of the payment. Declaration filed on 9/27/13 states this disbursement was for reimbursement of the filing fees, certified copies and miscellaneous costs advanced by their office. Need itemization.</p> <p>2. Disbursement schedule shows a payment to Shepard, Shepard and Janian on 6/20/11 in the amount of \$55.51 without stating the nature and purpose of the payment.</p> <p style="text-align: center;">Please see additional page</p> <p>Reviewed by: KT</p> <p>Reviewed on: 10/4/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 – Jensen</p>
	Account period: 1/1/11 – 12/31/12	
	Accounting - \$99,385.86	
	Beginning POH - \$57,863.35	
	Ending POH - \$ 2,841.05	
Cont. from 100213	Conservator - \$3,090.50 (20 hours @ \$47.00 per hour and 3910 miles @ \$.55 per mile)	
Aff.Sub.Wit.	Attorney - \$1,250.00 (per Local Rule)	
✓ Verified	Current bond is \$25,988.66. Petitioner request bond be reduced to \$5,000.00 \$20,000.00. (declaration filed on 10/1/13)	
Inventory	Petitioner prays for an Order:	
PTC	1. Approving, allowing and settling the second account.	
Not.Cred.	2. Authorizing the conservator commissions in the amount of \$3,090.00	
✓ Notice of Hrg	3. Authorizing attorney in the amount of \$1,250.00.	
✓ Aff.Mail W/		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
✓ 2620(c)		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

NEEDS/PROBLEMS/COMMENTS (cont.):

3. Disbursement schedule shows payments to the Conservator, for court ordered mileage and commissions, in the amount of \$6,762.00 on 5/26/11. Schedule D also shows payment to the conservator of \$6,762.00. Therefore, since Schedule B (disbursements) and Schedule D (disposition of Harry Jensen Estate) are both listed in the same column in the summary of account and are included in the total credits, it appears the conservator has been paid twice for his commissions and mileage.
4. Disbursement schedule shows payments to the attorney, for court ordered fees, in the amount of \$2,945.00 on 6/7/11. Schedule D also shows payment of \$2,945.00 to the attorney. Therefore, since Schedule B (disbursements) and Schedule D (disposition of Harry Jensen Estate) are both listed in the same column in the summary of account and are included in the total credits, it appears the attorney has been paid twice for his fees.
5. Need new order to reflect the additional items now included in the property on hand, the change in the bond amount and the change in the amount of the conservator's commission allowed per minute order dated 10/3/13.

Note: If the petition is granted, a status hearing will be set as follows:

- **Friday, February 6, 2015** at 9:00 a.m. in Department 303, for the filing of the third account.

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.

First Account and Report of Trustee and Petition for Settlement

		BRYAN JENSEN , Trustee, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Disbursement schedule show a disbursement for cigarettes in the amount of \$132.64 on 6/27/12 and another disbursement on 10/18/2012 for two carton cigarettes and wool jacket in the amount of \$185.43. Assets a "Special Needs Trust" are to be used for the "special needs" of the beneficiary. Cigarettes do not appear to be an appropriate disbursement for a "Special Needs" trust.</p> <p>2. Need proof of service of the Notice of Hearing on:</p> <ul style="list-style-type: none"> a. Department of Health Care Services b. Director of State Hospitals c. State Department of Developmental Services.
		Account period: 7/6/11 – 12/31/12	
		Accounting - \$43,133.28	
		Beginning POH - \$0	
		Ending POH - \$25,988.99	
Cont. from		Trustee - not addressed	
<input type="checkbox"/>	Aff.Sub.Wit.	Attorney - not addressed	
<input checked="" type="checkbox"/>	Verified	Petitioner prays for an Order:	
<input type="checkbox"/>	Inventory	1. Settling, allowing said firs account and report and allowing and confirming petitioner's acts as Trustee.	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<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 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: 10/4/13
			Updates:
			Recommendation:
			File 9 - Jensen