



## 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 Charmaine Tyler (Trust)**

**Case No. 0545053**

**Atty Roberts, Gregory J. (Joyce A. Henry – trustee/Petitioner)**

**Trustee's Third Accounting of Trust Assets and Petition for Its Approval; for Waiver of Future Accountings and for Allowance of Attorney's Fees and Costs**

|                                     |                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------------|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                     |                      | <b>JOYCE A. HENRY</b> , Trustee, is petitioner.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <b>NEEDS/PROBLEMS/COMMENTS:</b>                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                     |                      | Account period: 05/01/12 – 04/30/14                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                     |                      | Accounting - <b>\$419,215.90</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <p><b>Note:</b> If further accountings are not dispensed with, a status hearing will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Monday, 07/11/16 at 9:00 a.m. in Department 303</b> for the filing of the fourth account.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required accounting is filed 10 days prior to the hearing on the matter the status hearing will come off calendar and no appearance will be required.</p> |
| <b>Cont. from 100614</b>            |                      | Beginning POH - <b>\$327,870.67</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Aff.Sub.Wit.</b>  | Ending POH - <b>\$228,866.56</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input checked="" type="checkbox"/> | <b>Verified</b>      | Trustee - <b>not addressed</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Inventory</b>     | Attorney - <b>\$3,927.00</b> (Per declaration and itemization, 4.55 attorney hours @ \$280/hr. and 17.6 paralegal hours @ \$140/hr.)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>PTC</b>           | Attorney costs - <b>\$435.00</b> (certified copy and filing fees)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Not.Cred.</b>     | <p>Petitioner states that settlement payments from AIGA are all deposited electronically into the blocked account. The Court has authorized these payments to be distributed to Petitioner to pay for beneficiary's expenses, including care-giving services provided by Petitioner. The authorized payments are electronically transferred from the blocked account to a checking account established by Petitioner in the name of the Trust. The court has not required Petitioner to account for the expenses paid on behalf of beneficiary with these funds, but has required Petitioner to file a bond in the amount of \$46,500.00. Petitioner, who is beneficiary's mother, has cared for beneficiary exclusively since the accident which occurred while beneficiary was a minor and left her permanently severely disabled. The Court has required Petitioner to provide a biennial accounting for the blocked account. This is the third accounting of those funds. No withdrawals above the monthly settlement payments are permitted without a court order. Petitioner therefore requests that future accountings of the blocked account be waived until such time as the Trust attorney's fees and costs necessitated by the accountings but will not in any way be detrimental to the Trust or the Trust beneficiary, because there will be no change in the requirement of court approval for all disbursements from the account.</p> <p style="text-align: center;">Continued on Page 2</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input checked="" type="checkbox"/> | <b>Notice of Hrg</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input checked="" type="checkbox"/> | <b>Aff.Mail</b> w/   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Aff.Pub.</b>      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Sp.Ntc.</b>       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Pers.Serv.</b>    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Conf. Screen</b>  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Letters</b>       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Duties/Supp</b>   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Objections</b>    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Video Receipt</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>CI Report</b>     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>9202</b>          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input checked="" type="checkbox"/> | <b>Order</b>         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Aff. Posting</b>  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Status Rpt</b>    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>UCCJEA</b>        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>Citation</b>      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <input type="checkbox"/>            | <b>FTB Notice</b>    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                     |                      | <b>Reviewed by:</b> JF                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                     |                      | <b>Reviewed on:</b> 10/28/14                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                     |                      | <b>Updates:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                     |                      | <b>Recommendation:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                     |                      | <b>File 1 – Tyler</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

Petitioner states that on 05/03/12 the Court approved Petitioner's petition for the expenditure of \$53,652.00 for a new van to transport the Trust beneficiary. Petitioner delivered a cashier's check to David John of Driving Specialties, Ltd. on 05/14/12. Petitioner had been dealing with David John and this company for many years. Petitioner had no reason to believe that the van would not be delivered as promised. However, on 07/20/12, Petitioner had a conversation with David John and received an e-mail from him on 07/26/12 indicating that the van would not be delivered. Petitioner learned that there were 10 other individuals whose funds had been taken by David John in a similar manner. On 09/04/12, Petitioner submitted a claim to International Fidelity Insurance Company ("IFIC") the surety that issued the bond of David John on behalf of Driving Specialties, Ltd. Petitioner also filed an Investigative Complaint with the DMV. Petitioner also received correspondence from attorney Charles Sosa of the law firm representing IFIC indicating that the claims exceeded the amount of the bond and that IFIC would file an interpleader complaint if no agreement could be reached among all parties as to how the proceeds of the bond would be divided. Ultimately, the Interpleader Complaint was filed in Solano County. Petitioner, unsophisticated in litigation and most other legal matters, did not understand the meaning of being named a defendant in the action and did not believe she had to do anything further related to the litigation. Petitioner did not attempt to contact her attorney, Barrus and Roberts, P.C., nor any other attorney, regarding the theft of Trust funds by David John. Petitioner, Joyce Henry, had a default entered against her on 11/19/12. When attorney Roberts began preparing this Third Account, Petitioner relayed the details of this matter and provided him with all of the correspondence she had received, as well as her notes. In the meantime, in March 2013, David John applied the sum of \$3,000.00 as a down payment to facilitate Petitioner's purchase of a used 2011 Ford E350 van on 03/15/13. David John also indicated that he would make the payments on the van as they came due. Ultimately, in addition to the \$3,000.00 down payment, he has paid Petitioner an additional \$1,000.00 on 08/12/13 and \$500.00 each on 9/10/13 and 05/22/14 for a total of \$5,000.00. The monthly payments for the replacement van of \$521.52 began on 04/29/13. Petitioner also received a refund from the DMV in the amount of \$113.00. The contract for the replacement van was for a 6 year payout, with a total sum of \$37,549.44 ultimately due for the vehicle. Petitioner has been making the monthly payments on the replacement van from her own personal funds. On the accounting, since the money paid for the van authorized by the court was gone and no part of it was applied against the purchase of the replacement van, the book value shown is \$0.00. The current blue book value market value of the replacement van is estimated to be \$17,946.00. Petitioner apologizes to the court for her failure to contact her attorney, but truly believed that the actions filed in this matter would protect the Trust's interests to the fullest extent possible.

Bond is currently posted in the amount of \$46,500.00.

**Petitioner prays for an order:**

1. Settling and allowing the account and report and approving and confirming the acts of Petitioner and the Trust from 05/01/12 through 4/30/2014;
2. Authorizing and directing the Trustee to pay to Gregory J. Roberts the sum of \$3,927.00 for legal services and the sum of \$435.00 for costs advanced; and
3. Waiving future accountings of the blocked account until such time as the Trust terminates or the court otherwise orders.

Continued on Page 3

**Attorney's Statement Regarding Repayment of Funds to Trust** filed 10/22/14 includes a calculation and plan of restitution of funds misappropriated by David John, a Promissory Note, and a Deed of Trust with Assignment of Rents. The plan indicates that Trustee, Joyce Henry will continue making payments on the new van with her own funds (payments total \$37,549.44). According to the plan of restitution, there will be a balance remaining of \$10,989.56 after all payments on the new van are complete, but it is anticipated that the fair market value of the van will exceed that amount when the payments are complete. The promissory note is to be non-interest bearing, as the amounts still due to be paid on the new van include interest.

**Second Amended First and Final Accounting and Report of Status of Administration; Petition for Settlement Thereof; for Allowance of Statutory Attorney and Administrator's Compensation; for Reimbursement of Costs Advanced; and Petition to Close Estate**

|                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>DOD: 08/15/04</b>                                     | <b>CAROLYN LEWIS</b> , Executor, is Petitioner.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>NEEDS/PROBLEMS/COMMENTS:</b>                                                                                                                                                                                                                                                                                                                                                                                                  |
|                                                          | Accounting is waived.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|                                                          | I & A - <b>\$200,000.00</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|                                                          | POH - <b>\$44,675.17</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Cont. from 082514, 100614</b>                         | Executor - <b>waived</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>CONTINUED FROM 10/06/14 Minute Order from 10/06/14 states: The Court directs counsel to file a declaration.</b>                                                                                                                                                                                                                                                                                                               |
| <input type="checkbox"/> <b>Aff.Sub.Wit.</b>             | Attorney - <b>\$4,000.00</b> (statutory)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <p>1. The Petition requests that the full statutory fee be paid to the Attorney, however, Probate Code § 12205 states that the Court may reduce compensation to the personal representative and/or attorney when the time taken to close the estate exceeds the time prescribed in the code, etc. The decedent died in 2004 and Letters were issued on 12/08/05. The Court may consider reducing the requested compensation.</p> |
| <input checked="" type="checkbox"/> <b>Verified</b>      | Costs - <b>\$1,213.00</b> (filing fees, publication, probate referee)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <input checked="" type="checkbox"/> <b>Inventory</b>     | <b>Distribution, pursuant to decedent's will, is to:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <input checked="" type="checkbox"/> <b>PTC</b>           | Carolyn Lewis- <b>\$39,462.17</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <input checked="" type="checkbox"/> <b>Not.Cred.</b>     | <b>Declaration of Philip Flanigan in Support of Allowance of Statutory Attorney Fees</b> filed 10/20/14 states: as attorney for the personal representative, Carolyn Lewis, he prepared the initial Petition for Probate and supporting documents, Inventory & Appraisal and he required notices. After obtaining appointment as Executor, Ms. Lewis sold the real property asset of the estate and moved. She did not provide any forwarding information to the attorney. Correspondence sent to Ms. Lewis was not returned but no response was received either. As such, the file was thereafter ignored and only upon the Court's requiring the proper closing of the probate did his office engage in additional efforts to try and locate Ms. Lewis and file this Petition. Mr. Flanigan states that his office has done all that is required in order to complete the process and thus, he submits has earned the right to statutory compensation. While the matter would not have been closed absent the Court's insistence, the fact remains that his office's efforts allowed Petitioner, who is the sole beneficiary of the estate, to be able to sell the property. Nevertheless, if the Court disagrees, he is willing to abide by the Court's determination as to reasonable compensation for his services and have no objection to a reduction in the compensation being requested. Declarant understands that Ms. Lewis is not in good health and thus his primary objective is to get this matter closed. |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <input checked="" type="checkbox"/> <b>Notice of Hrg</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <input checked="" type="checkbox"/> <b>Aff.Mail</b> w/   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Aff.Pub.</b>                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Sp.Ntc.</b>                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Pers.Serv.</b>                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Conf. Screen</b>                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Letters</b> 12/06/05                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Duties/Supp</b>                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Objections</b>                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Video Receipt</b>                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>CI Report</b>                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <input checked="" type="checkbox"/> <b>9202</b>          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <input checked="" type="checkbox"/> <b>Order</b>         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Aff. Posting</b>                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Status Rpt</b>                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>UCCJEA</b>                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Citation</b>                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <input checked="" type="checkbox"/> <b>FTB Notice</b>    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Reviewed by:</b> JF                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Reviewed on:</b> 10/28/14                                                                                                                                                                                                                                                                                                                                                                                                     |
|                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Updates:</b>                                                                                                                                                                                                                                                                                                                                                                                                                  |
|                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Recommendation:</b>                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>File 3 - Geise</b>                                                                                                                                                                                                                                                                                                                                                                                                            |

|                                     |               |                                                                                                                                                                                                 |
|-------------------------------------|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                     |               | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p>First and Final Account filed 10-14-14<br/>                 is set for hearing on 11-20-14</p> |
|                                     |               |                                                                                                                                                                                                 |
|                                     |               |                                                                                                                                                                                                 |
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|                                     |               |                                                                                                                                                                                                 |
| <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 checked="" type="checkbox"/> | Status Rpt    |                                                                                                                                                                                                 |
| <input type="checkbox"/>            | UCCJEA        |                                                                                                                                                                                                 |
| <input type="checkbox"/>            | Citation      |                                                                                                                                                                                                 |
| <input type="checkbox"/>            | FTB Notice    |                                                                                                                                                                                                 |
|                                     |               | Reviewed by: skc                                                                                                                                                                                |
|                                     |               | Reviewed on: 10-28-14                                                                                                                                                                           |
|                                     |               | Updates:                                                                                                                                                                                        |
|                                     |               | Recommendation:                                                                                                                                                                                 |
|                                     |               | File 5 - Anguiano                                                                                                                                                                               |



|                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                |
|--------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| <p><b>DOD: 10-7-12</b></p>                                               | <p><b>JOAN ST. LOUIS</b>, Spouse, filed Petition for Assumption of Law Practice of David St. Louis on 9-6-13.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>                                         |
| <p>Cont. from 111313, 112013, 010814, 022614, 052814, 062514, 092214</p> | <p><b>Background: Mrs. St. Louis' petition requested:</b></p> <ol style="list-style-type: none"> <li>1) That the Court assume jurisdiction over the law practice of David J. St. Louis and appoint attorney <b>PAUL T. CHAMBERS</b> to represent and assist the Court in assuming jurisdiction;</li> <li>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 <b>attorney-client trust account which contained \$54,502.09 at 3-31-13;</b></li> <li>3) Coordinate with Allison St. Louis, former legal secretary, to determine the clients entitled to funds and the amounts each is owed;</li> <li>4) Upon determining the recipients and the amounts owed, that Mr. Chambers be allowed to issue checks to the recipients without further court order;</li> <li>5) Specifically, that Mr. Chambers be allowed, without further Court order, to issue checks from a certain estate account (<b>John K. Shirin Estate</b>) to those recipients entitled thereto; and</li> <li>6) Upon completion, provided accounting.</li> </ol> | <p><b>Note:</b> Page B is the status hearing for filing of the accounting.</p> |
| <p>Aff.Sub.Wit.</p>                                                      | <p><b>Non-Opposition to Petition was filed 9-30-13 by the State Bar of California.</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <p><b>Reviewed by:</b> skc</p>                                                 |
| <p>Verified</p>                                                          | <p><b>A Creditor's Claim and Request for Special Notice</b> was filed 9-30-13 by Attorney J. Patrick Sullivan, who represents Walter Wentz, Creditor.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <p><b>Reviewed on:</b> 10-28-14</p>                                            |
| <p>Inventory</p>                                                         | <p><b>Limited Opposition to Petition</b> was filed 10-9-13 by <b>BIANCA SORIA</b>. Ms. Soria states she was a client of Mr. St. Louis, who was wired <b>\$65,000.00</b> 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><b>Updates:</b></p>                                                         |
| <p>PTC</p>                                                               | <p><b>At hearing on 10-16-13, the Court granted the petition with additional orders and set this status hearing. See Page 2 for specifics.</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <p><b>Recommendation:</b></p>                                                  |
| <p>Not.Cred.</p>                                                         | <p>Subsequent to the hearing, both attorneys David Roberts and Donald Cram submitted competing proposed orders.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <p><b>File 11A – St. Louis</b></p>                                             |
| <p>Notice of Hrg</p>                                                     | <p>Therefore, the Court was to address the competing proposed orders at this status hearing on 11-13-13.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <p><b>SEE ADDITIONAL PAGES</b></p>                                             |
| <p>Aff.Mail</p>                                                          | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Aff.Pub.</p>                                                          | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Sp.Ntc.</p>                                                           | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Pers.Serv.</p>                                                        | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Conf. Screen</p>                                                      | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Letters</p>                                                           | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Duties/Supp</p>                                                       | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Objections</p>                                                        | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Video Receipt</p>                                                     | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>CI Report</p>                                                         | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>9202</p>                                                              | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Order</p>                                                             | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Aff. Posting</p>                                                      | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Status Rpt</p>                                                        | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>UCCJEA</p>                                                            | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>Citation</p>                                                          | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |
| <p>FTB Notice</p>                                                        | <p></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p></p>                                                                        |

**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.**

**Note: 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 signed by the Court 5-14-14, which included specific distribution relative to the Shirin Estate.**

**Note: The amended order was apparently submitted to the Court for signature ex parte without petition. \$60.00 is due for the amended order.**

**11B David J. St. Louis (2468)**  
**Atty Roberts, David A. (for Joan St. Louis)**  
**Atty Chambers, Paul T. (Practice Administrator)**

**Case No. 13CEPR00789**

**Status Hearing Re: Filing of Accounting of the Practice Administrator**

|                                                                 |                                                                                                                                                                                                     |                                                                                             |
|-----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
|                                                                 | <p><b>DAVID J. ST. LOUIS</b>, an attorney, passed away 10-7-12.</p>                                                                                                                                 | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>                                                      |
| <p><b>Cont. from 030614, 032614, 052814, 062514, 092214</b></p> | <p><b>On 10-16-13</b>, pursuant to the petition of <b>JOAN ST. LOUIS</b>, Attorney <b>PAUL T. CHAMBERS</b> was appointed as Practice Administrator pursuant to Probate Code §9764 without bond.</p> | <p><u>Continued from 3-6-14, 3-26-14, 5-28-14, 6-25-14, 9-22-14</u></p>                     |
| <p><b>Aff.Sub.Wit.</b></p>                                      |                                                                                                                                                                                                     | <p><b>1. Need account or verified written status report pursuant to Local Rule 7.5.</b></p> |
| <p><b>Verified</b></p>                                          | <p>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).</p>                          |                                                                                             |
| <p><b>Inventory</b></p>                                         |                                                                                                                                                                                                     |                                                                                             |
| <p><b>PTC</b></p>                                               |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Not.Cred.</b></p>                                         |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Notice of Hrg</b></p>                                     |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Aff.Mail</b></p>                                          |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Aff.Pub.</b></p>                                          |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Sp.Ntc.</b></p>                                           |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Pers.Serv.</b></p>                                        |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Conf. Screen</b></p>                                      |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Letters</b></p>                                           |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Duties/Supp</b></p>                                       |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Objections</b></p>                                        |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Video Receipt</b></p>                                     |                                                                                                                                                                                                     |                                                                                             |
| <p><b>CI Report</b></p>                                         |                                                                                                                                                                                                     |                                                                                             |
| <p><b>9202</b></p>                                              |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Order</b></p>                                             |                                                                                                                                                                                                     |                                                                                             |
| <p><b>Aff. Posting</b></p>                                      |                                                                                                                                                                                                     | <p><b>Reviewed by:</b> skc</p>                                                              |
| <p><b>Status Rpt</b></p>                                        |                                                                                                                                                                                                     | <p><b>Reviewed on:</b> 10-28-14</p>                                                         |
| <p><b>UCCJEA</b></p>                                            |                                                                                                                                                                                                     | <p><b>Updates:</b></p>                                                                      |
| <p><b>Citation</b></p>                                          |                                                                                                                                                                                                     | <p><b>Recommendation:</b></p>                                                               |
| <p><b>FTB Notice</b></p>                                        |                                                                                                                                                                                                     | <p><b>File 11B – St. Louis</b></p>                                                          |

Probate Status Hearing RE: Receipt for Blocked Account

|                   |                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | STEPHANEE WOODWARD, Cousin, was appointed as Guardian of the Person and Estate pursuant to Order entered 8-28-14 with all fund to be blocked.     | NEEDS/PROBLEMS/COMMENTS:<br><br>Continued from 9-30-14                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|                   |                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|                   |                                                                                                                                                   | <u>Minute Order 9-30-14</u> : Counsel will file documents regarding issues on Examiner Notes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Cont. from 093014 | Separately on 8-28-14, the Court set this status hearing for the filing of the receipt for blocked account and sent notice to Attorney Van Doren. |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Aff.Sub.Wit.      |                                                                                                                                                   | <u>As of 10-28-14, nothing further has been filed. The following issue remains:</u>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Verified          |                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Inventory         |                                                                                                                                                   | <ol style="list-style-type: none"> <li>1. Need receipt for blocked account (MC-356) or verified status report pursuant to Local Rule 7.5.</li> </ol> <p><u>Note</u>: Guardianship of the estate was requested in order to obtain any insurance or pension funds due the minor; however, at the time of appointment, the nature and amounts expected were unclear. The Court may require clarification regarding actions taken to determine whether the minor is entitled to lump sums or monthly payments, and if so, need Order to Deposit Money Into Blocked Account (MC-355).</p> <p><u>Note</u>: The Court also set a status date of <u>1-13-15</u> for the filing of the Inventory and Appraisal.</p> |
| 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      |                                                                                                                                                   | Reviewed by: skc                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Status Rpt        |                                                                                                                                                   | Reviewed on: 10-28-14                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| UCCJEA            |                                                                                                                                                   | Updates:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Citation          |                                                                                                                                                   | Recommendation:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| FTB Notice        |                                                                                                                                                   | File 12 - Fuente                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

**Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

|                                                     |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>DOD: 8-1-13</b>                                  | <b>PRIMAVERA DAMME</b> , Daughter, is Petitioner and requests appointment as Administrator with Full IAEA with bond of \$175,000.00. | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>CONTINUED TO 12-3-14</u></b><br/>Per attorney request</p> <ol style="list-style-type: none"> <li><b>1. Need Duties and Liabilities of Personal Representative (DE-147) and Confidential Supplement (DE-147S)</b></li> <li><b>2. Need Notice of Petition to Administer Estate (DE-121)</b></li> <li><b>3. Need proof of service of Notice of Petition to Administer Estate at least 15 days prior to the hearing pursuant to Probate Code §8110 on all parties listed at #8 of the petition:</b><br/> <ul style="list-style-type: none"> <li>- Javier F. Sanchez (son)</li> <li>- Daniel Adan Sanchez (son)</li> </ul> </li> <li><b>4. Need publication pursuant to Probate Code §8120.</b></li> <li><b>5. Need Order.</b></li> <li><b>6. Need Letters.</b></li> </ol> |
|                                                     | Petitioner is a resident of Mesa, AZ.                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Aff.Sub.Wit.</b>                                 | Full IAEA – need publication                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <input checked="" type="checkbox"/> <b>Verified</b> | Decedent died intestate                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Inventory</b>                                    | Residence: Fresno                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>PTC</b>                                          | Publication: need publication                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Not.Cred.</b>                                    | Estimated value of estate:                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Notice of Hrg</b>                                | Personal property: \$ 5,000.00                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Aff.Mail</b>                                     | Real property: \$ 170,000.00                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Aff.Pub.</b>                                     | Total: \$ 175,000.00                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Sp.Ntc.</b>                                      | Probate Referee: Rick Smith                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Pers.Serv.</b>                                   |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Conf. Screen</b>                                 |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Letters</b>                                      |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Duties/Supp</b>                                  |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Objections</b>                                   |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Video Receipt</b>                                |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>CI Report</b>                                    |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>9202</b>                                         |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Order</b>                                        |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Aff. Posting</b>                                 |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Status Rpt</b>                                   |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>UCCJEA</b>                                       |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Citation</b>                                     |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>FTB Notice</b>                                   |                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|                                                     |                                                                                                                                      | <b>Reviewed by:</b> skc                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                                     |                                                                                                                                      | <b>Reviewed on:</b> 10-28-14                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|                                                     |                                                                                                                                      | <b>Updates:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|                                                     |                                                                                                                                      | <b>Recommendation:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|                                                     |                                                                                                                                      | <b>File 14 – Valencia</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |



**Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820)**

|                          |                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                          | <b>MANILA VANG</b> , Sister, is Petitioner and requests appointment as Probate Conservator of the Person with medical consent powers. | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Court Investigator advised rights on 8-26-14.</p> <p><u>Continued from 9-11-14</u></p> <p><u>Minute Order 9-11-14:</u><br/>Petitioner waiting on Capacity Declaration.</p> <p>As of 10-28-14, nothing further has been filed.</p> <p>1. Need Capacity Declaration (Form GC-335) in support of request for medical consent powers.</p> |
|                          | <b>Voting rights <u>not</u> affected</b>                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Cont. from 091114</b> |                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>Aff.Sub.Wit.</b>                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                 |
| ✓                        | <b>Verified</b>                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>Inventory</b>                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>PTC</b>                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>Not.Cred.</b>                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                 |
| ✓                        | <b>Notice of Hrg</b>                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                 |
| ✓                        | <b>Aff.Mail</b>                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>Aff.Pub.</b>                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>Sp.Ntc.</b>                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                 |
| ✓                        | <b>Pers.Serv.</b>                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                 |
| ✓                        | <b>Conf. Screen</b>                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                 |
| ✓                        | <b>Letters</b>                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                 |
| ✓                        | <b>Duties/Supp</b>                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>Objections</b>                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                 |
| ✓                        | <b>Video Receipt</b>                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                 |
| ✓                        | <b>CI Report</b>                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>9202</b>                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                 |
| ✓                        | <b>Order</b>                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>Aff. Posting</b>                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>Status Rpt</b>                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>UCCJEA</b>                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                 |
| ✓                        | <b>Citation</b>                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          | <b>FTB Notice</b>                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                 |
|                          |                                                                                                                                       | <p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 10-28-14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 22 – Le Chang</b></p>                                                                                                                                                                                                                        |

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

|                                                        |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
|--------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>DOD: 11-6-13</b>                                    | <b>SOURIYA PHOUTHAVONE</b> , Son, is<br>Petitioner and requests appointment as<br>Administrator with Full IAEA without bond. | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Continued from 9-29-14.</u></p> <p><u>Minute Order 9-29-14:</u> The Court recommends Petitioner to seek legal advice. Examiner Notes given.</p> <p><u>As of 10-28-14, nothing further has been filed.</u></p> <p><u>The following issues remain:</u></p> <p><u>See Page 2</u></p> |
|                                                        | Full IAEA – Need publication                                                                                                 |                                                                                                                                                                                                                                                                                                                                |
| <b>Cont. from 092914</b>                               |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Aff.Sub.Wit.</b>           | Decedent died intestate                                                                                                      |                                                                                                                                                                                                                                                                                                                                |
| <input checked="" type="checkbox"/> <b>Verified</b>    | Residence: Fresno                                                                                                            |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Inventory</b>              | Publication: Need publication                                                                                                |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>PTC</b>                    | Estimated value of estate: \$0                                                                                               |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Not.Cred.</b>              | Probate Referee: Rick Smith                                                                                                  |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Notice of Hrg</b>          |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Aff.Mail</b>               |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Aff.Pub.</b>               |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Sp.Ntc.</b>                |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Pers.Serv.</b>             |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Conf. Screen</b>           |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input checked="" type="checkbox"/> <b>Letters</b>     |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input checked="" type="checkbox"/> <b>Duties/Supp</b> |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Objections</b>             |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Video Receipt</b>          |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>CI Report</b>              |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>9202</b>                   |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input checked="" type="checkbox"/> <b>Order</b>       |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Aff. Posting</b>           |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Status Rpt</b>             |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>UCCJEA</b>                 |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>Citation</b>               |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
| <input type="checkbox"/> <b>FTB Notice</b>             |                                                                                                                              |                                                                                                                                                                                                                                                                                                                                |
|                                                        |                                                                                                                              | <b>Reviewed by:</b> skc                                                                                                                                                                                                                                                                                                        |
|                                                        |                                                                                                                              | <b>Reviewed on:</b> 10-28-14                                                                                                                                                                                                                                                                                                   |
|                                                        |                                                                                                                              | <b>Updates:</b>                                                                                                                                                                                                                                                                                                                |
|                                                        |                                                                                                                              | <b>Recommendation:</b>                                                                                                                                                                                                                                                                                                         |
|                                                        |                                                                                                                              | <b>File 23 – Phouthavone</b>                                                                                                                                                                                                                                                                                                   |

**NEEDS/PROBLEMS/COMMENTS:**

1. The petition is blank at #5.a.(3) and (4) and at #5.a.(7) and (8). Need verified declaration with this information. Was the decedent survived by a domestic partner or no domestic partner? Was the decedent survived by issue of a predeceased child or no issue of a predeceased child?
2. Petitioner lists one other relative at #8 – Chaytha Phouthavone – but does not state this relative's relationship to the decedent.

**Note:** It appears from is person's age that he or she is a sibling of the petitioner. However, Petitioner states at #5.a. that the decedent was survived by a spouse. Need verified declaration containing a complete list of relatives who should be listed per #8.

3. Need Notice of Petition to Administer Estate (Form DE-121) and proof of service of Notice on all relatives at least 15 days prior to the hearing per Probate Code §8110.
4. Need publication pursuant to Probate Code §8120 and Local Rule 7.9.
5. Petitioner estimates the value of the estate at \$0. The Court may require clarification.
6. This petition was filed with a fee waiver. If estate assets are distributed in the future, Petitioner should be aware that the original Court filing fee will be due at that time.

**Note:** Petitioner may wish to seek legal advice from an attorney as to probate is a necessary or appropriate procedure to handle the decedent's estate. There may be other procedures available to Petitioner depending on the reason for probate. Remember that a document service or paralegal cannot give legal advice. Petitioner is encouraged to research the procedures at the Fresno County Law Library or consult with an attorney to decide how to proceed.