

Probate Status Hearing Re: Filing 1st Account

DOD: 10/12/2014	WILLIAM T. GOLDEN , nephew, was appointed Conservator of the Person and the Estate, with bond set at \$242,550.00, on 06/12/2013.	NEEDS/PROBLEMS/COMMENTS: 1. Need First Account.
Cont. from	Receipt of Bond in the amount of \$242,550.00 filed 08/05/2013.	
Aff.Sub.Wit.		
Verified	Letters issued 08/07/2013.	
Inventory	Inventory and Appraisal filed 09/03/2013 shows an estate valued at \$180,828.34.	
PTC		
Not.Cred.	Minute Order of 06/24/2013 set this matter for the filing of the First Account.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.	Status Report filed 11/05/2014 states the Conservatee, Bernadette Steele, recently died on 10/12/2014. It is the intent of the Conservator to file a first and final account with the Court within the next 90 days. A continuance is respectfully requested regarding the filing of the first account and report be continued until 02/04/2015.	
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 11/05/2014
		Updates:
		Recommendation:
		File 1 Steele

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

DOD: 05/23/2013	<p>DONALD J. GRANZ, son, was appointed Executor with full IAEA authority without bond, on 09/03/2013.</p> <p>Letters issued 09/03/2013</p> <p>Partial No. 1 Inventory and Appraisal filed 01/29/2014 shows an estate valued at \$361,346.16.</p> <p>Final Inventory and Appraisal filed 01/29/2014 shows an estate valued at \$200,000.00.</p> <p>Minute Order of 09/03/2013 set this Status Hearing for the filing of the First Account and/or Final Distribution.</p> <p>Status Report of Counsel filed 11/04/2014 states the administration was unexpectedly delayed during the summer of 2014 when the Executor became ill and was required to be hospitalized for two surgeries. The Executor has now recovered sufficiently from his illness to press forward with the estate administration, including finalizing the sale of the Decedent's residence. The Executor will need to proceed with the sale of the residence, and to allow for possible delays caused by the upcoming holiday season, the Executor requests that the Court continue the matter for a minimum of six (6) months to allow him to conclude the administration of the probate estate.</p>	NEEDS/PROBLEMS/COMMENTS:
		<p>1. Need First Account or Petition for Final Distribution.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 11/05/2014
		Updates:
		Recommendation:
		File 2 - Granz

Status Hearing Re: Filing of the First Account

Age: 17		<p>ISABEL VELASQUEZ, Mother, was appointed as Guardian of the Estate on 09/05/2013 without bond, all funds to be deposited to a blocked account.</p> <p>Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked account filed 11/25/2013 indicates \$7,423.75 was received.</p> <p>Final Inventory and Appraisal filed 11/25/2013 reflects \$7,423.75.</p> <p>Minute Order of 09/05/2013 set this Status Hearing for the Filing of the First Account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need First Account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
DOB: 04/28/1997			
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: LV	
		Reviewed on: 11/05/2014	
		Updates:	
		Recommendation:	
		File 3 - Espinoza	

Petitioner believes the Declaration of Trust under which she has been acting is valid and requests the Court confirm that all of the settlors' interest in the subject property be deemed an asset subject to the trust and under the control of Petitioner as trustee. See Estate of Heggstad (1993) 16 Cal.App.4th, 943; 20 Cal. Rptr.2d. 433.

All beneficiaries have signed verified declarations stating that they are in agreement with the petition and with an expedited hearing date waiving the 30 day notice requirement.

Petitioner prays for an order that:

1. The Semas Family Trust dated 12-22-97 is valid;
2. Petitioner is the Successor Trustee of the trust;
3. All of the interest of Tony C. Semas and Mary B. Semas in the real property on Pico Avenue in Clovis, CA, is an asset subject to the management and control of Petitioner as successor trustee of the trust; and
4. Such other orders as the Court may deem just and proper.