



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) Third and Final Account and Report and (2) Petition for Fees

Age: 18	GARY and SHANA SCHAFFER , Uncle and Aunt, and Guardians of the Person and Estate, are Petitioners.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Property on hand at the close of the last account period (9-30-12) was <u>\$121,995.83</u>; however, Petitioner states the property on hand at the beginning of this account period (10-1-12) was <u>\$112,753.23</u>. Need clarification regarding the discrepancy of <u>\$9,242.60</u>. Petitioners state <u>the guardians have directed</u> the establishment of the trust. The trust, however, appears to indicate that Kaleb Schafer is the settlor. The Court may require clarification or authority regarding the guardians' directing establishment of the trust, since Kaleb has reached the age of majority, or verification that Kaleb wishes to transfer the guardianship estate funds to this trust. (<i>Note: This is <u>not</u> a trust funded by Court order as contemplated by the Probate Code and/or Cal. Rules of Court and does not require further Court oversight, accounting, etc.</i>). Court records indicate a balance due of \$730.00 for unpaid court investigation fees from the establishment of the guardianship. Need payment of \$730.00 prior to distribution. Need order. Order should reflect the dollar amount of the actual distribution after payment of the authorized fees and Court fees. In addition to the order settling the account, need Order for Withdrawal of Funds from Blocked Account (MC-358).
	Account period: 10-1-12 through 10-1-13	
<input type="checkbox"/> Aff.Sub.Wit.	Accounting: \$154,587.68	
<input checked="" type="checkbox"/> Verified	Beginning POH: \$112,753.23	
<input type="checkbox"/> Inventory	Ending POH: \$152,952.68 (cash)	
<input type="checkbox"/> PTC	Guardians: not requested	
<input type="checkbox"/> Not.Cred.	Attorney: \$1,250.00 (per local rule)	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney (Trust preparation): \$2,750.00	
<input checked="" type="checkbox"/> Aff.Mail	Petitioners state that because the guardianship estate will be terminated, the guardians have directed the establishment of a trust for the benefit of Kaleb Schafer (attached Exhibit D) prepared by Attorney Stephen Denning. Petitioners request the Court authorize payment to Attorney Denning from the guardianship estate.	
<input type="checkbox"/> Aff.Pub.	Petitioner prays for an order:	
<input type="checkbox"/> Sp.Ntc.	1. Approving, allowing, and settling the third and final account;	
<input type="checkbox"/> Pers.Serv.	2. Authorizing attorney fees to Attorney Nancy Stegall;	
<input type="checkbox"/> Conf. Screen	3. Authorizing attorney fees to Attorney Stephen Denning for legal services related to trust agreement;	
<input type="checkbox"/> Letters	4. Approving the funding of the trust with the balance of the funds contained in the blocked guardianship estate account of \$152,852.68.	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 2620(c)		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Reviewed by: skc
Reviewed on: 11-14-13
Updates:
Recommendation:
File 1 – Schafer

(1) First Account and Report of Conservator of the Estate and Petition for Approval Thereof and (2) for Allowance of Compensation to Conservator of the Estate and (3) for Attorneys Fees

	BRUCE D. BICKEL , Conservator of the Estate with bond of \$1,298,519.36, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: Note: Harry Baker is Conservator of the Person. Note: The Court will set a status hearing for the filing of the next account as follows: • Friday 11-7-15 If filed prior to that date per local rules, the status hearing may be taken off calendar.
	Account period: 6-25-12 through 6-30-13		
	Accounting:	\$2,228,926.47	
	Beginning POH:	\$2,145,567.74	
	Ending POH:	\$2,081,185.53	
	Conservator: \$35,864.90 for 276 hours by petitioner and his staff. See declaration. Fees are both categorized by subject and itemized by date, including work regarding appointment matters, residence matters, property management, account management, income tax matters, and general administration. Petitioner states the complexity of the administration has been simplified under his management and the Conservatee has demanded less attention as the administration has found a routine. See analysis of time, compensation. Petitioner believes this amount is fair and reasonable.		
	Attorney: \$1,741.50 per Exhibit B		
	Bond of \$1,298,519.36 is sufficient.		
	Petitioner prays for an order:		
	1. Approving, allowing, and settling the account as filed;		
	2. Authorizing the conservators and attorney fees and commissions;		
	3. Such other relief as the Court considers proper.		
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	2620(c)		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Reviewed by: skc			
Reviewed on: 11-14-13			
Updates:			
Recommendation:			
File 2 – Haney			

Age: 91	CURTIS D. RINDLISBACHER , petitioner, was Court appointed to represent the Conservatee on 05/21/13.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of service by mail of <i>Notice of Hearing</i> at least 15 days before the hearing for: - Brooke Castle (conservator)</p>
Cont. from	BROOKE A. CASTLE , granddaughter, was appointed Conservator of the Person and Estate on 08/21/13.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Petitioner requests fees in connection with the representation of the Conservatee for the petition to appoint a conservator.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Petitioner asks that he be paid from the conservatorship estate for 23 hours @ \$310.00/hour and 1.85 hours @ \$100.00/hour for a total of \$7,315.00.	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Petitioner also requests that he be reimbursed \$551.00 for costs incurred for telephonic appearance through Court Call and Filing fees.	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp	Services are itemized by date and include review of documents, visits with clients, and court appearances.	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 11/14/13
		Updates:
		Recommendation:
		File 4 – Stott

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 16 months	<u>TEMPORARY EXPIRES 11/21/13</u>		NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 06/25/13</u> Minute Order from 06/25/13 states: Father objects to guardianship. Temp extended to 11/21/13. As of 11/14/13, nothing new has been filed in this matter. 1. Need proof of personal service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence</i> for: - Darwin Bush, Jr. (father?) Note: A notice of hearing for the hearing on the Temporary Guardianship was filed 01/28/13 reflecting personal service on Mr. Bush on 01/11/13, it is unclear however, if he was also served with a copy of the documents and also with a Notice of Hearing regarding the hearing on 03/12/13. 2. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence</i> for: - Paternal grandparents - Maternal grandfather
	DONYALE KINGSBY , maternal grandmother, is Petitioner. Father: DARWIN BUSH, JR. – <i>Personally served on 01/11/13</i> Mother: SHAKIRA MONIQUE ROSEMOND – <i>Personally served on 01/15/13</i> Paternal grandfather: NOT LISTED Paternal grandmother: JANET MACKLIN Maternal grandfather: NOT LISTED Petitioner alleges that the mother is incarcerated and the father is unknown. Petitioner states that the mother gave Petitioner custody of the child. Court Investigator Samantha Henson filed a report on 03/05/13.		
Cont. from 031213, 062513			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input checked="" type="checkbox"/> Pers.Serv.			
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report	<input checked="" type="checkbox"/>		
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
Reviewed by: JF			
Reviewed on: 11/14/13			
Updates:			
Recommendation:			
File 10 - Bush			