

**SUPERIOR COURT, STATE OF CALIFORNIA
COUNTY OF SANTA CLARA**

Department 2, Honorable Amber Rosen, Presiding
Audrey Nakamoto, Courtroom Clerk

191 North First Street, San Jose, CA 95113
Telephone 408-882-2120

**ADVANCE CASE STATUS REPORT (“ACSR”)
(Local Probate Rule 1)**

GENERAL PROBATE CALENDAR – Department 2

DATE: Monday, March 9, 2026 TIME: 9:00AM

*****NOTICE*****

**APPEARANCES MAY BE IN PERSON OR REMOTE THROUGH
UNICORN DIGITAL COURTROOM (UDC)**

**To find the appropriate remote appearance links please go to:
<https://santaclara.courts.ca.gov/online-services/remote-hearings>**

“PREAPPROVED” matters are those reviewed and found satisfactory. Personal appearance by the petitioning party is not required. Pre-approved matters to which objections are made may be continued. Orders for preapproved matters will be signed upon calling of the calendar and may be picked up for filing at that time.

“PROBATE EXAMINER NOTES” - If a matter is not preapproved, then the Probate Examiner will list procedural defects. Parties may file additional documents to correct procedural deficiencies, and the Court, in its discretion, may consider such filings in making its order. The Court may order a matter off calendar, grant it subject to additional filings, or order a continuance.

TROUBLESHOOTING

If you do not see the appropriate ACSR, then it has either not been posted yet or your web browser cache (temporary internet files) is accessing a prior calendar. “REFRESH” or “QUIT” your browser and reopen it, or adjust your internet settings to see only the current version of the web page. Your browser may access old information from old cookies even after the current calendar has been posted.

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LINE #	CASE #	CASE TITLE	ACSR/Examiner notes
LINE 1	18PR185081	<i>Conservatorship of Nancy Lee Crippen</i>	Click on line #1 or scroll below to line #1 for probate examiner notes.
LINE 2	20PR187985	<i>Conservatorship of Olivia Reyes</i>	Click on line #1 or scroll below to line #1 for probate examiner notes.
LINE 3	22PR192447	<i>The Thomas Beier Medi-Cal Trust</i>	Click line #3 or scroll below to line #3 for probate examiner's notes.
LINE 4	24PR196754	<i>Guardianship of Alexis De Santiago</i>	Click on line #4 or scroll below to line #4 for probate examiner notes.
LINE 5	24PR196755	<i>Guardianship of Roberto De Santiago, Jr.</i>	Click on line #5 or scroll below to line #5 for probate examiner notes.
LINE 6	25PR201202	<i>The Nancy L. Crippen Trust</i>	Click on line #6 or scroll below to line #6 for probate examiner notes.
LINE 7	16PR178827	<i>Conservatorship of Thomas Andrew Jeglum</i>	No examiner deficiencies noted. Appear for the Court's ruling.
LINE 8	16PR179112	<i>Conservatorship of Beverly Arnold Kenzie</i>	No Probate Examiner review was completed per 1/15/26 minute order.
LINE 9	17PR181899	<i>Conservatorship of Mark Raymond Bateman</i>	No deficiencies noted by probate examiner. Parties to appear for the Court's ruling.
LINE 10	21PR190051	<i>Estate of William Wickersham</i>	Click on line #10 or scroll below to line #10 for probate examiner notes.
LINE 11	24PR198006	<i>Estate of Richard Varas Valdez</i>	Click on line #11 or scroll below to line #11 for probate examiner notes.
LINE 12	25PR200055	<i>Conservatorship of Harry A. Hadley, Jr.</i>	No examiner deficiencies noted. Appear for the Court's ruling.
LINE 13	25PR201584	<i>Estate of Jenny Jungyeon Park</i>	Click on line #10 or scroll below to line #10 for probate examiner notes.
LINE 14	25PR201618	<i>Gleason Family Trust dated 8/19/1997 as amended and restated</i>	No proposed order. <i>One was submitted to efile, but rejected for lack of mandatory cover sheet EFS-020. Atty will need to resubmit.</i>
LINE 15	25PR201620	<i>The ListenOnRepeat LLC Pension Trust</i>	Click line #15 or scroll below to line #15 for probate examiner's notes.

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18PR185081 Conservatorship of Nancy Lee Crippen

1. Receipts Schedule- (Third Accounting)
 - a. entries that are described only as “Transfer for care”, “Transfer Nancy Care”, “Transfer Q1 Div” and “Q1 VGI 1500 dividends”, “Transfer July dividend”, “Transfer Dividend and care” and all entries without naming which Trust the transfer came from, under category “Transfers from Trust” – needs more information re which Trust is the source of the transfer. Petition states the conservatorship estate received transfers from two different trusts. Local Probate Rule 9A.1(c).
 - b. Franchise Tax Board (\$1,851), Schwab CD interest, and other entries that are indicated as dividend or interest - why are they categorized as transfer from Trust? Needs clarification.
2. Transfer Schedule (Third account) transfer of the entire Edward Jones Account to the Tech CU #7368 account which PTR states is owned by the Trust. What is the authority for transferring the funds from the E. Jones to Tech CU #7368? When it was discovered that the Tech CU account is not a conservatorship asset why was the funds not returned to the Conservatorship estate?
3. Liabilities Schedule (Third Account)- indicates _ there are unpaid attorneys and conservator fees but does not provide value of these fees. Defers if will require.
4. Conservator fees- Declaration indicates conservator charged \$1,059 for 18 hours of bookkeeping and bill pay services charged at rate of \$55/hr. Math seems off. (18 x 55 = \$990). Needs to explain discrepancy.
5. Proposed order does not specify distribution of the balance of estate assets.

Calendar line 2

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20PR187985, Conservatorship of Olivia Reyes

Procedural Deficiencies

1. Schedule of Disbursements includes a transaction of \$241.71 for payment of “CardMember Service – 8/22/23 - Other Loan.” May need explanation. What loan is this referring to?

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Calendar line 3

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22PR192447 The Thomas Beier Medi-Cal Trust

1. Invoice attached to atty's declaration in support of fees, which was filed on 10/22/25, reflects services rendered by one of atty's staff with initials JHK, with an hourly rate of \$350. This JHK is not included in the list of paralegals who assisted atty in this matter per atty's supporting declaration. The atty's declaration did not describe qualifications of JHK as paralegal pursuant to CA Rules of Court 7.703(e)(1) & 7.754

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24PR196754 Guardianship of Alexis De Santiago

1. No "Notice of Filing Inventory and Appraisal and How to Object to the Inventory or the Appraised Value of Property" (Judicial Council mandatory form GC-042). (Prob Code § 2610, subd. (a); Local Probate Rule 12(A)(4))
2. In the future, the Summary of Account (form GC-400(SUM)/GC-405(SUM)) should be used in all guardianship accountings. (Cal. Rules of Court, rule 7.575(e)(5)).

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24PR196755 Guardianship of Roberto De Santiago, Jr.

1. No "Notice of Filing Inventory and Appraisal and How to Object to the Inventory or the Appraised Value of Property" (Judicial Council mandatory form GC-042). (Prob Code § 2610, subd. (a); Local Probate Rule 12(A)(4))
2. In the future, the Summary of Account (form GC-400(SUM)/GC-405(SUM)) should be used in all guardianship accountings. (Cal. Rules of Court, rule 7.575(e)(5)).

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25PR201202 The Nancy Lee Crippen Trust

1. Petition at Item II.A indicates period of account for the first accounting is from 7/27/20 to 6/9/24. However, the following Summary of Account indicates the period of account as from 7/27/20 to 6/20/25. Needs clarification.
2. Petition does not address bond. The Trust at section 7.2(b) indicates bond is required and may not be waived by beneficiaries. Is TTE bonded? PTN is not clear. There is no request to discharge bond either. Defers if needs clarification.
3. Second and Final Account;
 - a. Receipts Schedule; entry 6/12/24 described as “final care bill for Nancy” (\$5,552.42) - is this income or disbursement or a refund? Needs more information.
 - b. Disbursement Schedule: entry 6/20/24 “Companion Care” (\$38,914.43). Needs more information. Is this expenses for companion care from what period and why was it not paid by the conservatorship estate?
 - c. Schedule of Distribution – Payor is identified as “Trust Beneficiary”. Who are the beneficiaries that received the distribution? Needs more information.
 - d. Edward Jones account- how did this account become a Trust asset? How was it transferred from the conservatorship to the Trust when it was reported as a CSP asset?

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21PR190051, Estate of William Wickersham

Procedural Deficiencies

1. Notice of Hearing filed 12/17/25 states that the property that is the subject of the petition is "See Exhibit A – Banker Boxes." But there is no Exhibit A or anything else attached to the notice to indicate what the subject property is.
2. No proof of service.
3. No proposed order.

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24PR198006 Estate of Richard Varas Valdez

1. POS of notice filed 1/27/2026 (2nd page form DE-120) does not specifically indicate notice by international mail for respondent Leybiozeth V. Correa who is listed at an address in Toluca, Mexico. (Prob. Code § 1215, subd. (a)(1)(B))
2. Proposed order is in the alternative. And it does not specify the shares of the persons being determined as entitled to distribution. (Prob. Code §11705, subd. (a)).

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25PR201584 Estate of Jenny Jungyeon Park

Procedural Deficiencies

1. There is no Notice of Hearing.
2. There is no Proof of Service of the Notice of Hearing.
3. There is no Attachment 7 to the Petition.
4. There is no Attachment 7a1 to the Petition.
5. There is no listing of the decedent's children to the Petition.
6. The Proposed Order does not list any assets to be determined to have passed to the Surviving Spouse.
7. The Petition alleges that a Petition For Probate is being filed with this Petition.

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25PR201620 The ListenOnRepeat LLC Pension Trust

1. Petitioner's interest – petition merely stated that Petitioner is an interested person and is familiar with administration of trust. Petition did not provide basis of Petitioner's interest in the trust and standing to bring this petition concerning trust affairs.
2. Petition did not provide names and addresses of persons entitled to notice of the petition. Probate Code §17201
3. Copy of the trust instrument is not provided in the petition.
4. Petition did not identify the person who created the trust and whether he/she is living or if he/she is deceased, the date of his/her death.

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