

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

Department 2, Honorable Lori E. Pegg, 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: Thursday, September 26, 2024 TIME: 9:00am

*****NOTICE*****

**APPEARANCES MAY BE IN PERSON OR REMOTE THROUGH
MICROSOFT TEAMS**

**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	19PR185798	<i>Conservatorship of Cheryl L. Thompson</i>	Click line #1 or scroll below to line #1 for probate examiner's notes.
LINE 2	21PR191064	<i>Carl E. Arnold Revocable Trust</i>	Click line #2 or scroll below to line #2 for probate examiner's notes.
LINE 3	23PR194099	<i>Conservatorship of Freitas</i>	Click line #3 or scroll below to line #3 for probate examiner's notes.
LINE 4	24PR197662	<i>The Haynie Family Revocable Trust of April 19, 2000</i>	No examiner deficiencies noted. Parties to appear for the Court's ruling.
LINE 5	2015-1-PR176235	<i>Conservatorship of Kristine Hanna-Lomax</i>	Pre-approved
LINE 6	23PR194930	<i>Estate of Patrick Justin Agard</i>	Preapproved
LINE 7	23PR195259	<i>Estate of Mark Vignau</i>	Parties to appear for court ruling.
LINE 8	24PR197794	<i>The Rojas Living Trust</i>	Click line #8 or scroll below to line #8 for probate examiner's notes.
LINE 9	24PR197813	<i>Special Needs Trust FBO Marcel R. Jasson created under The Marcelo H. Jasso 1999 Living Trust</i>	Click line #9 or scroll below to line #9 for probate examiner's notes.
LINE 10			
LINE 11			
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LINE 24			
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Calendar line 1

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19PR185798 Conservatorship of Cheryl L. Thompson

1. No Proof of Service of Notice for Petition for Approval of Conservator's Second Account on file or pending in e-file. PC section 1460
2. No original bank account lodged purs to PC section 2620(c)(1)
3. No facility statements lodged purs to PC section 2620(c)(5).

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Calendar line 2

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21PR191064 Carl E. Arnold Revocable Trust

1. Schedule C – Disbursements – 6/15/2023 - \$43 bond fee.
2. Need a proposed order.

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23PR194099 Conservatorship of Freitas

1. No CI Referral filed for this petition for account. Probate Local Rule 11.K.
2. Why is the beginning period of account 4/21/23 when Order and letters of CSP were issued only on 4/27/23? Generally, the period of account starts on date letters are issued. PrC section 2620, Handbook for Conservators, 5.9-
3. Receipts Schedule does not comply with PrC section 1052(a) and Probate Local Rule 9.A(1)c –
4. Receipts Schedule entries “Web Funds Transfer from Account” – does not identify the account; if this is transfer between accounts, then, why are they reported in the Receipts Schedule? Transfers between accounts are not receipts. PrC section 1063(b) and Fiduciary Accounting Handbook (2024) section 4.8.
5. Disbursement Schedule
 - a. Following entries do not comply with PrC section 1062(b) and Probate Local Rule 9.A(1)c.
 1. Payments to Robert Kellman, Jennifer Lau, Nancy Mauntz, Danielle Reyna, Cathy Jelic
 2. Southwest gas online payments – does CNE own a vehicle?
 3. Mortgage payments- does the Conservatorship own a house? Why is this not disclosed in the Inventory and Appraisal?
 4. “Tahoecitypod”- what is this payment for?
 5. “Wells Fargo Hom Online Pmt”
 6. IRS Tax payment of \$70,000- needs more information
 7. Check payment of \$12,282
 8. Multiple check payments in various amounts
 9. Insurance premiums paid- what type of insurance was paid?
 10. Armanino LLP for \$7,712.81
 11. Web Fund Transfers – to what account were the transfers made and why?
 12. Placercoproptax web payments- needs more information.
 13. Chase Credit card payments
 - b. Entries are not categorized. Probate Local Rule 9.A(1)c
6. Schedule E, value of End assets on hand is reflected as \$8,142.6- this does not match the end assets on hand on the Schedule of Summary of account which reflects a value of \$17,010.7. See also issue on bank statement below.
7. Schedule E does not provide at least last four digits of bank accounts listed.
8. Bank Statements
 - a. No beginning statement for Wells Fargo account ending in 0270. What was submitted were statements for Dec. 2022, Dec. 2023 and January 2024. The last statement for January 2024 shows balance of \$531.64, assuming this is the last statement, why is the value of this asset at end of account less that this amount?
 - b. Statement for Accounting ending in 2417, value of assets based on statement as of 4/30/24 does not match value of end assets on hand in Schedule E or Summary of Account.

9. No notice of hearing filed for this petition. Probate Local Rule 11.K.
- 10.** No proof of service of notice of hearing and petition filed for anyone.
- 11.** No proposed order submitted.

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24PR197662 The Haynie Family Revocable Trust of April 19, 2000

No examiner deficiencies noted. Parties to appear for the Court's ruling.

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2015-1-PR176235 Conservatorship of Kristine Hanna-Lomax

Pre-approved

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23PR194930 Estate of Patrick Justin Agard

Preapproved

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Calendar line 8

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24PR197794 The Rojas Living Trust

- 1.** Petition does not provide account numbers (at least the last four digits) of the retirement accounts subject of petition. Defers to Court if will require corrective action.
- 2.** Notice of hearing is not in mandatory judicial council specific for PrC section 850 petitions. (Form DE-115). PrC section 851(c)(1).
- 3.** No proof of service of notice of hearing and petition for other named beneficiaries of the Trust. PrC section 17203

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24PR197813

Special Needs Trust FBO Marcel R. Jasson created under The Marcelo H. Jasso 1999 Living Trust

1. Petition #12 – Parties entitled to notice does not list the trustee of the SNT. Prob C §17201, §17203
 - a. POS of notice includes John DePiazza.
2. Clerical items:
 - a. At various places, including the prayer, the petitioner refers to the main trust as the “The Marcelo *J.* Jasso 1999 Living Trust.”
 - b. Petition #12 lists the petitioner as “Marcelo *H.* Jasso”

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