

**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: Thursday, December 18, 2025

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	17PR181095	<i>Conservatorship of Santa Koch</i>	Click line #1 or scroll below to line #1 for probate examiner notes.
LINE 2	19PR185430	<i>Conservatorship of Leonora Ancheta</i>	Click line #2 or scroll below to line #2 for probate examiner notes.
LINE 3	20PR187837	<i>Conservatorship of Patricia L. Bustamante</i>	Click line #3 or scroll below to line #3 for probate examiner notes.
LINE 4	23PR195824	<i>Estate of John Zoltan Gazdag</i>	Click line #4 or scroll below to line #4 for probate examiner's notes.
LINE 5	24PR197194	<i>Estate of Chris Roscher Lampe</i>	Click line #5 or scroll below to line #5 for probate examiner notes.
LINE 6	24PR198611	<i>Turner Family Revocable Trust</i>	Click line #6 or scroll below to line #6 for probate examiner notes.
LINE 7	1990-1-PR-124467	#7 - 1990-1-PR-124467	No examiner deficiencies noted. Parties to appear for the Court's ruling.
LINE 8	22PR192748	<i>The Villalobos Living Trust</i>	Click line #8 or scroll below to line #8 for probate examiner notes.
LINE 9	24PR196358	<i>Alanis Living Trust</i>	(Mr. Van Keuelen's petition.) No deficiencies noted. Parties to appear.
LINE 10	24PR196358	<i>Alanis Living Trust</i>	(Mr. Kutche's cross-petition.) No proposed order.
LINE 11	25PR200916	<i>Guardianship of Lena Lim</i>	Click line #11 or scroll below to line #11 for probate examiner notes.
LINE 12	25PR201173	<i>In the Matter of Anthony Snider</i>	Click line #12 or scroll below to line #12 for probate examiner notes.
LINE 13			
LINE 14			
LINE 15			
LINE 16			
LINE 17			
LINE 18			
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LINE 20			

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Calendar line 1

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17PR181095 Conservatorship of Santa Koch

1. Petition paragraph 7 states account statements will be confidentially lodged with the court. No Bank Statements lodged in the court file.
2. No proposed order on file or pending in e-file.

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19PR185430 Conservatorship of Leonora R. Ancheta

Previously noted procedural Deficiencies -

1. Letters issued 8/21/2019. No *Inventory and Appraisal* (Judicial Council mandatory form GC-040) has been filed along with *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). Probate C §2610
See Local Probate Rule 11(H)
2. All conservatorship accountings must follow the content and format required in CRC 7.575. See Local Probate Rule 9(A)(2)
 - a. No *Summary of Account-Standard and Simplified Accounts* [form GC-400(SUM)/GC-405(SUM)]
 - b. No schedules listing the assets on hand at beginning of account period.
 - c. No detailed schedules showing receipts.
 - d. No schedules listing the assets on hand at end of account period.
 - e. Only schedule is entitled “Schedule C – Disbursements During Period Of Account” but it is not properly sub-categorized. See Local Probate Rule 9(A)(2) – see concern #4
 - f. No statement disclosing whether any family or affiliate relationship existed between the fiduciary and any agent hired by the fiduciary during the accounting period. Probate C §1064(a)(4)
3. The final court accounting of the conservator following the death of the conservatee shall include a court accounting for the period that *ended* on the date of death and *a separate accounting* for the period subsequent to the date of death. Probate Code §2620(b). See Local Probate Rule 11(R)(1)
4. No confidential financial account statements were lodged in the electronic case file. Probate C §2620(c)(2)
5. No statement re sufficiency of bond. Local Probate Rule 9(A)(3)
6. Assets are unknown. Final disposition of the conservatorship estate is unknown. It is unknown if a personal representative has been appointed.

Calendar line 3

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20PR187837 Conservatorship of Patricia L. Bustamante

1. Petition, at #13, Summary of Account shows losses from Sales or other dispositions of \$3,829.55 and makes reference to Schedule D. The Schedule of Summary of Account and Schedule D, however shows \$0.0 losses. Needs explanation.
2. Summary of Account, Third Accounting- Missing Form GC-400(SUM). Local Probate Rule 9.A(2).
3. Needs proposed order

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Calendar line 4

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23PR195824 Estate of John Gazdag

1. Receipts Schedule A include distribution from the Ware Trust totaling \$409,060.01. Receipts should not include any assets received during the period of account that are not asset on hand at the beginning. These distributions from DCD's mother's trust appear to be "Additional Property" received during account period where a Supplemental Inventory and Appraisal should have been filed by Executor.
2. The declaration of Steven Hoffman in support of request for extraordinary fees by personal representative did not include statement of facts showing the benefit of the services to the estate and did not specify the amount requested for each category of service performed. CA Rules of Court 7.702
3. PTR proposes to distribute \$1,601,968.35 in cash to Veteran's Administration, the sole residuary beneficiary. Why is the distribution in cash when the ending assets on hand listed on Schedule E includes cash and securities? Need clarification.
4. The petition and proposed order did not list and describe in detail the property to be distributed. The description must include amount of cash, and complete description of each individual security held in "street name" in security brokers' accounts. CA Rules of Court 7.651, Local Rule 9H
5. The proof of service of notice filed on 9/2/25 did not provide the date of mailing (item 4a not completed).

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24PR197194 Estate of Chris Roscher Lampe

1. Petition #26 – States the probate referee's fee of \$75.00 has not been paid. It is not part of the itemized fees for reimbursement. Who will pay the referee's fee. Local Probate Rule 14
2. No explanation of the source of payment for attorney's statutory compensation (\$2,884.44), probate referee fee (\$75), and executor's cost reimbursement (\$1,758.36). Ending cash in estate is only \$572. Local Probate Rule 9(C)(6)
3. Need a proposed order.

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24PR198611 Turner Family Revocable Trust

1. The Trustee billed 1% for the years 2019, 2020, & 2021. The Trustee billed 0.5% for the years 2022, 2023, and 2024. The Trustee cites Article 7.05 indicating that the Trustee is entitled to reasonable compensation without court order. The practice of this court has been to require fee declarations describing services provided and hourly rates. The Trustees have billed and been paid a total of \$216,075.00 since 2019.
2. There is no fee declaration by the Gendotti Law Firm. They billed \$3,760.50.

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22PR192748 The Villalobos Living Trust

1. No POS of notice. (Prob. Code § 17203)
2. Petition is not signed by all of the petitioners. (Prob. Code § 1020)
3. Petition does not list the names and addresses of each person entitled to notice of the petition. (Prob. Code § 17201)
4. No proposed order submitted.

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25PR200916 Guardianship of Lena Lim

1. Petition at #1.c requests no bond be required and the guardianship estate valued at \$364,000 be deposited in a blocked account. However, the name of the institution and location is not specified. Needs correction.
2. No CI Referral filed for this petition. Local Probate Rule 12.A(1).
3. Needs order to deposit monies into a blocked account. \
4. Needs revised proposed order at #10.c, to specify name and location of institution where the monies of minor will be deposited

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25PR201173 In the Matter of Anthony Snider

1. Petition #2, in full: "Venue is proper in Santa Clara County because one of the real property parcels is in Santa Clara County."
 - a. Copy of decedent's Death Certificate at Exhibit A appears to reflect residence in Salinas, Monterey County.
 - b. Examiner defers to the Court but believes Monterey County (the county of the decedent's residence) is the proper venue. The locations of the real properties (Santa Clara and San Mateo) only seem relevant for recording a final court order.

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