

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

**Department 7, Honorable Charles Adams, Presiding**

191 North First Street, San Jose, CA 95113  
Telephone 408-882-2110

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

**GENERAL PROBATE CALENDAR – Department 7**

**DATE: Wednesday, March 4, 2026**

**TIME: 9:00 am**

**\*\*\*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 calendar’s 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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<b>LINE #</b>	<b>CASE #</b>	<b>CASE TITLE</b>	<b>ACSR/Examiner notes</b>
<a href="#">LINE 1</a>	22PR192069	<i>Estate of Lauren Riley</i>	Click line #1 or scroll below to line #1 for probate examiner's notes.
<a href="#">LINE 2</a>	22PR193216	<i>Estate of Greg Walter Anderson</i>	Click line #2 or scroll below to line #2 for probate examiner's notes.
<a href="#">LINE 3</a>	22PR193690	<i>Estate of Saling Huang</i>	Click line #3 or scroll below to line #3 for probate examiner's notes.
<a href="#">LINE 4</a>	23PR195256	<i>Estate of Josephine Gutierrez</i>	Click line #4 or scroll below to line #4 for probate examiner's notes.
<a href="#">LINE 5</a>	25PR199070	<i>Estate of Sharon Bogerty</i>	Click line #5 or scroll below to line #5 for probate examiner's notes.
<a href="#">LINE 6</a>	20PR187956	<i>Estate of Jerry Brown</i>	No procedural deficiencies noted. Appear for court ruling.
<a href="#">LINE 7</a>	22PR192258	<i>Guardianship of Zoey Aya Wing-Yan Zee</i>	No procedural deficiencies noted. Appear for court ruling.
<a href="#">LINE 8</a>	22PR193804	<i>Estate of Gina M. Kramer</i>	No proposed order.
<a href="#">LINE 9</a>	23PR194183	<i>Estate of Clarita Ignacio Malmborg</i>	No proposed order.
<a href="#">LINE 10</a>	24PR197021	<i>Estate of Kenneth Maupoin</i>	Withdrawal of petition filed by Petitioner
<a href="#">LINE 11</a>	26PR201671	<i>Dennis G. Lezchuk Trust</i>	Click line #11 or scroll below to line #11 for probate examiner notes.
<a href="#">LINE 12</a>	26PR201672	<i>The Williams Grandchildren's Trusts Dated</i>	No examiner deficiencies noted. Appear for the Court's ruling.
<a href="#">LINE 13</a>	26PR201673	<i>Marylou Olsen Boyle Trust dated October 13, 2000</i>	No examiner deficiencies noted. Appear for the Court's ruling.
<a href="#">LINE 14</a>	26PR201684	<i>Estate of Mary Sutton</i>	No examiner deficiencies noted. Appear for the Court's ruling.
<a href="#">LINE 15</a>	2013-1-PR-171997	<i>Hawshing Lu Trust</i>	Click line #15 or scroll below to line #15 for probate examiner notes.
<a href="#">LINE 16</a>	23PR196183	<i>Estate of Kathleen Anne Chernoff</i>	No procedural deficiencies noted. Appear for court ruling.
<a href="#">LINE 17</a>			
<a href="#">LINE 18</a>			

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**Calendar line 1**

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**22PR192069 Estate of Lauren Riley**

1. Account Period – Petition at paragraph #15 states that the account covers period from 4/7/21 to 1/27/23, however the attached schedules listed period of account as 4/17/21 to 12/1/2025. Need clarification.
2. Missing schedule of property on hand at beginning of account. Probate Code §1062(f)
3. Schedule G – Distribution to Beneficiary, did not provide date of distribution.
4. Missing fair market value of assets on hand. Local Probate Rule 9A(1)(e)
5. Petition states that decedent’s granddaughter Jalisa Yukie Riley, who is the sole residuary beneficiary under decedent’s Will assigned her interest in the real property to the Petitioner, so the proposed distribution of the real property is to PTR. No Assignment of Interest by Jalisa Riley has been filed.
6. Petition requests payment of atty’s fees to Jeffrey Mentzos in the amount of \$4,375.00, which is less than the statutory fees he is entitled to pursuant to Probate Code 10810. The estate does not have any liquid assets. How will atty’s fees be paid? The petition did not provide explanation of the source of payment for these fees. Local Probate Rule 9C(6)
7. The petition did not contain omnibus clause.
8. No notice of hearing and proof of service of notice to anyone. Probate Code §11000
9. No proposed order submitted.

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**22PR193216 Estate of Greg Walter Anderson**

1. Assets on hand include cash and non-cash assets. The petition did not provide fair market value of assets on hand. Local Probate Rule 9A(1)(e)
2. No proposed order. The proposed order submitted in the e-file queue was rejected due to missing cover sheet.

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**22PR193690 Estate of Saling Huang**

1. The petition did not provide fair market value of assets on hand. Local Probate Rule 9A(1)(e)
2. The probate estate does not have any liquid assets. The petition did not provide any explanation of the source of payment of atty's statutory and extraordinary fees. Local Probate Rule 9C(6)
3. No proposed order submitted.

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**23PR195256 Estate of Josephine Gutierrez**

1. Omnibus clause in the petition states that any property not now known or discovered that may belong to the estate should be distributed without further court order to Petitioner Sandra Ann Gutierrez. The decedent's holographic Will bequeaths specific assets to Petitioner but did not include provisions regarding residuary estate. Hence, assets not specified in the Will shall be distributed per intestacy law, and in this case, to the decedent's five adult children and issue of predeceased child. There is no service of notice to decedent's other children and grandchild, namely Alfred Anthony Gutierrez, Christina Lawless, Joanna Sanchez, Magdalena J Thomas, and Jeffrey Ryan Dougherty. Probate Code §§11000, 1220
2. The petition did not provide fair market value of assets on hand. Local Probate Rule 9A(1)(e)
3. Proposed order @ paragraph #9a did not specify the amount of cash held in the estate bank account that shall be distributed to the PTR. Local Probate Rule 9H
4. The omnibus clause in the proposed order needs to be revised to reflect that any later discovered assets shall be distributed to the intestate heirs.

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**25PR199070 Estate of Sharon Bogerty**

1. The fee base used for calculation of statutory fees include income receipts totaling \$12,814.33. There is no schedule of receipts provided in the petition. 7.550(b)(6)
2. Waiver of account for one of heirs, Sabrina Bogerty (niece) was executed by Ramona Bogerty, who states she is the court appointed guardian of Sabrina Bogerty. The waiver of account did not state if Ramona is guardian/conservator of the estate of Sabrina, and which Court appointed her as guardian. Defers to Court if copy of Letters of Guardianship for estate of Sabrina Bogerty will be required.
3. Satisfaction/Release of creditor's claim by Wells Fargo for the amount of \$5,324.35 has not been filed. Petition states this claim has been paid and Satisfaction of Claim is awaited.
4. Proposed order @ paragraph 4 indicates that Sabrina Bogerty's share of the estate in the amount of \$640,873.89 shall be directly distributed to her. Ramona Bogerty signed waiver of account on behalf of Sabrina Bogerty stating she is the court appointed guardian of Sabrina. If Ramona is the guardian or conservator of the estate of Sabrina, shouldn't Sabrina's share be distributed to Ramona, as guardian of her estate? Need clarification.
5. Proposed order @ paragraph 5 did not provide the names of distributees and their corresponding percentage interest in any later discovered assets that belong to the estate.

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**26PR201671 Dennis G. Lezchuk Trust**

1. Petition does not state the names and addresses of each person entitled to notice of the petition. (Prob. Code § 17201)
2. Petition does not include copies of the operative 2017 Trust instrument or 2020 Trust amendment.
  - a. Examiner is unable to determine if notice was proper. (Prob. Code § 851)
3. Petition is unsigned and unverified by petitioner Kathleen Martin. (Prob. Code §§1020, 1021, subd. (a)(1).
4. The petition contains no formal prayer. There is a section entitled “IV. Conclusion” that states, in full: “For the reasons set forth above, the Court should invalidate the 2020 Trust Amendment and order full disclosure of the assets within the 2017 Trust and their monetary value.”
  - a. A “prayer” is the specific request for judgment, relief and/or damages at the conclusion of a petition. Prayers within a petition should be drafted so that their general effect may be determined without reference to separate paragraphs within the petition, attachments, supplements, or other later filed documents.
5. Kristi Marie Peoro and Scott Dennis Lezchuk's Response filed 2/23/2026 is unsigned and unverified by the respondents. (Prob. Code §§1020, 1021, subd. (a)(2).

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**2013-1-PR-171997 Hawshing Lu Trust**

1. Petition – Defers to Court if will require a supplement.
  - a. does not name parties entitled to notice. Probate Code section 17201.
  - b. Does not address venue or indicate where Trust is being administered by Trustee.  
Minor issue.
  - c. Does not name the Trustee and beneficiaries of the Trust.
2. Notice of hearing filed is not in mandatory judicial council Form (form DE-115) specific for Probate Code section 850 petitions that describes the property subject of the petition. Proof of service is also not in mandatory form which is page 2 of form DE-115.
3. No proof of service of notice and petition for Earle and Reimer, the attorney of record for Ms. Alice Zhuk aka as Alice Lu.

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