

SUPERIOR COURT OF CALIFORNIA, COUNTY OF LOS ANGELES

Department LA 9

09/14/2010

Court Convened at: 0130PM

Honorable Judge Reva G. Goetz
none, Deputy SheriffAndrea Murdock, Deputy Court Clerk
Tamara Vogl CSR #10186, Reporter

BP-108870 501 SPEARS, BRITNEY JEAN - CONSERVATORSHIP
Conservatorship-Pers
ACCOUNT CURRENT
Petitioner(s): Spears, James P.
Attorney(s): Wyle, Geraldine A., Esq. ✓
Continuance Number: 2 Continuance From: 8/18/2010 12:00:00AM
Last Date Changed: 9/8/2010 2:06:36PM Last Note Changed By: SRILEY

S. Ingham (PVP)
A. Waret

To clear probate notes "filed documents" must be submitted to Rm 258, within time frames set forth in Rule 10.3 of LASC Rules. You may contact the Probate Attorney whose E-Mail address appears at the end of these notes, subject to compliance with all conditions governing the use of Interactive E-Mail. E-mail Rules are available in Rm 258 and on the Court's web site at www.LASuperiorCourt.org.

PRIOR ORDER CONT TO: 9/14/10 to clear notes <Court and counsel confer in chambers (off the record). Orders are made on the record.>
8/19/10

Filed 6/15/10
2nd acct 1/1/09 to 3/31/10

No Crt Invest Rept lodged

MATTERS TO CLEAR:

- A. ntc to consee given? Proof to be filed?
- B. M.O. dated 3/16/10 ordered addl bond - has it been filed? what is date of filing?
- C. funds on deposit at BofA appear to be in excess of federal insurance limits
- D. is bond sufficient? (Including amt of recovery bond - PC 2620)
- E. I/A by probate referee for items listed in Sch A-15 - see M.O. dated 3/16/10
- F. no I/A for intellectual property rights (self appraisal auth per M.O. dated 3/16/10)
- G. items acquired after date of appointment of conservator should not be listed in sch A-15
- H. no A/O approving 1st accounting in file (per 3/16/10 M.O.)
- I. no A/O waiving appraisal by Probate Referee in file (per 3/16/10 M.O.)
- J. why no income reported for SEI Investments?
- K. why are assets managed under power of atty included in this acctng?- see PC 1063(h) re reporting of these assets
- L. reconciliation of business entities on hand at end of last accounting period and ending period of this accounting is needed
- M. how does accounting balance when Property On Hand at Beg of Acct (reported in "Charges") lists businesses with TBD values and Property On Hand Sch F (reported in "Credits") assigns values?
- N. are all business entities and property rights listed?
- O. why doesn't value of Annuity at beginning of accounting period match the amount reported in Property On Hand end of acctng period?
- P. why does amt pd to Simpson differ from what was reported in first accounting?
- Q. provide sch of FMV of assets on hand at end of accounting period
- R. re bank statements: BofA checking bal per summary of acct is not reconciled to statement balance - missing statements for BofA White; BofA Summit; BofA DR & statement for Annuity

RECOMMENDED DISPOSITION:

Order to be Prepared By:

RELATED ITEMS: 502

Clerk: _____ Attorney: _____

SPEARS, BRITNEY JEAN - CONSERVATORSHIP

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RE BUSINESS ENTITIES:

- S. were all royalty pmts reported in schedule of receipts?
T. were all pmts to attys - paid pursuant to Court order?

RELIEF:

1. JTD account

PA's COMMENTS: Defer for supplement
sriley@lasuperiorcourt.org jj
SRR 8/11/10

Court and counsel confer in chambers (off the record).

ON THE RECORD:

The Court's order on March 16, 2010 for Department 9 is hereby modified nunc pro tunc as of March 16, 2010 as follows:

- By deleting: \$25 million Bond
By adding: \$3.5 million Bond, for total bond of \$5 million

Proof of the bond shall be filed not later than September 30, 2010.

The order on the 1st Accounting shall be submitted not later than September 30, 2010.

Fee Petition's

MINUTE ORDER

<input type="checkbox"/> Granted	<input type="checkbox"/> Denied Without Prejudice	<input type="checkbox"/> Completed	<input checked="" type="checkbox"/> Continued to <u>9-30-10 at 8:30 A.M.</u>	<input type="checkbox"/> Submitted	<input type="checkbox"/> Off-calendar
<input type="checkbox"/> As Supplemented	<input type="checkbox"/> Person and Estate	<input type="checkbox"/> No Bond	<input type="checkbox"/> Bond of \$_____ Additional	<input type="checkbox"/> Will and	<input type="checkbox"/> Codicil(s) Admitted
<input type="checkbox"/> Full/Limited/No IAEA	<input type="checkbox"/> Lacks Medical Capacity and Voting Capacity	<input type="checkbox"/> Fees Granted in the Amount of \$_____	<input type="checkbox"/> Supplemental Probate Investigator/DCFS Report Ordered	<input type="checkbox"/> Give Notice Waived	<input type="checkbox"/> Bond Exonerated
<input type="checkbox"/> Dementia Powers Granted	<input type="checkbox"/> Medical and Placement	<input type="checkbox"/> PC 2351.5 powers granted	<input type="checkbox"/> Parties stipulate to Judge Pro Tem- written	<input type="checkbox"/> Court Investigation/DCFS/Regional Center Report is placed in the Confidential Envelope / is admitted into evidence as Court's Exhibit 1 and sealed	<input type="checkbox"/> No further review required
<input type="checkbox"/> Court has Read and Considered/Approved Report	<input type="checkbox"/> Appearance of Minor(s)/counsel waived for next hearing	<input type="checkbox"/> PVP Appointed/Reamains/Discharged			
<input type="checkbox"/> Court Investigation/DCFS/Regional Center Report is placed in the Confidential Envelope / is admitted into evidence as Court's Exhibit 1 and sealed	<input type="checkbox"/> PVP Appointed/Reamains/Discharged				
<input type="checkbox"/> PVP/Attorney/Citee/Party Ordered Back/Discharged/As Prayed	<input type="checkbox"/> Re: if proof of deposit to a blocked account filed				
<input type="checkbox"/> New Citation to issue/personal service	<input type="checkbox"/> Commissions: _____, Title: _____				
<input type="checkbox"/> Confirmed for \$_____	<input type="checkbox"/> Time to Administer Estate // Special/Temporary Letters Extended/Granted to _____				
<input checked="" type="checkbox"/> Accounting to be filed by <u>11-19-10</u>	<input type="checkbox"/> and Set for Hearing on <u>12-15-10 at 1:30pm</u>				

RECOMMENDED DISPOSITION:

Order to be Prepared By:

RELATED ITEMS: 502

Clerk: _____ Attorney: _____

SPEARS, BRITNEY JEAN - CONSERVATORSHIP

09/14/2010

LA 9

BP-108870

501