1 Raffi Leon George (Estate) Case No. 04CEPR01552

Attorney Simonian, Jeffrey D (Armen L. George – Former Administrator)

Probate Status Hearing RE: Filing of the First or Final Account

DOD: 10/28/2004		
Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

LEON Y. GEORGE (Deceased), father, and **ARMEN L. GEORGE,** brother, were appointed as Co-Administrators with Full IAEA without bond and Letters issued on 1-25-05.

Court removes Armen L. George as Administrator and appoints Hrant George as Special Administrator per minute order of 11/30/2015.

Inventory and Appraisal Partial No. 1 was filed on 01/09/2015 indicating real property valued at $160,000.00 and personal property valued at $1,500.00.

Final Inventory and Appraisal Partial No. 2 was filed 04/20/2015 indicating personal property valued at $139,728.83

Minute Order of 11/30/2015 set this Status Hearing for the filing of the First or Final Account.
Minute Order states: Mr. Simonian confirms the address used for notice to Armen L. George after speaking with his brother this morning. The Court orders that Armen L George is removed as Administrator forthwith, and the Court appoints Hrant George as Special Administrator with Limited Powers until 01/04/2016. Mr. Simonian is to prepare orders and Letters. No appearance is necessary on 01/04/2016 if the petition is filed at least two Court days prior.

NEEDS/PROBLEMS/COMMENTS:

1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.

2. Need Order of Special Administration appointing Hrant George.
3. Need Letters of Special Administration appointing Hrant George.

Reviewed by: LV
Reviewed on: 12/16/2015
Updates:
Recommendation:
File 1 - George

Dept. 303, 9:00 a.m. Monday, January 4, 2016

2 Laney McClellan, Clayton McClellan, Tully McClellan (GUARD/P)

Case No. 10CEPR01047

Guardian **Carlton, Jennifer (pro per – paternal aunt)**
Father **McClellan, Lance D. (pro per – Petitioner)**

Petition for Termination of Guardianship

Laney, 10		
Clayton, 9		
Tully, 5		
Cont. from		
	Aff.Sub.Wit.	
✓	**Verified**	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	x
	Aff.Mail	x
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	x
	9202	
✓	**Order**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

LANCE D. MCCLELLAN, father, is Petitioner.

JENNIFER CARLTON, paternal aunt, was appointed guardian of the minors on 01/25/11. – *Consents and waives notice*

Mother: **NATOSHA LOGAN**

Paternal grandfather: TULLY MCCLELLAN
Paternal grandmother: RHONDA MCCLELLAN

Maternal grandfather: DECEASED
Maternal grandmother: SHELLY CLOWERS

Petitioner states [see file for details].

Court Investigator Dina Calvillo filed a report on – NEED REPORT.

NEEDS/PROBLEMS/COMMENTS:

1. Need *Notice of Hearing*.
2. Need proof of service by mail at least 15 days before the hearing of *Notice of Hearing* or Consent & Waiver of Notice or Declaration of Due Diligence for:
   a. Natosha Logan
   b. Tully McClellan
   c. Rhonda McClellan
   d. Shelly Clowers
3. Need CI report and clearances – CI to provide.

Reviewed by: JF
Reviewed on: 12/16/15
Updates:
Recommendation:
File 2 - McClellan

Dept. 303, 9:00 a.m. Monday, January 4, 2016

3 Loretta M. Drummond (Estate) Case No. 11CEPR00689

Atty **Neilson, Bruce A. (for Janette Courtney – Executor – Petitioner)**
Atty **Dawson, Joanne E. (Pro Per – Beneficiary – Objector)**

(1) First and Final Account and Report of Executor and Petition for Its Settlement, (2) for Allowance to Executor and Attorneys for Compensation for Ordinary and Extraordinary Services and for (3) Final Distribution

DOD: 6-9-11

Cont from 022515, 022615, 050715, 111615

	Aff.Sub.Wit.	
✔	Verified	
✔	Inventory	
✔	PTC	
✔	Not.Cred.	
✔	Notice of Hrg	
✔	Aff.Mail	W
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
✔	Letters 9-15-11	
	Duties/Supp	
✔	Objections	
	Video Receipt	
	CI Report	
✔	9202	
✔	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
✔	FTB Notice	

JANETTE COURTNEY, Executor with Full IAEA without bond, is Petitioner.

Account period: 9-15-11 through present
Accounting: $560,956.26
Beginning POH: $498,824.07
Ending POH: $84,654.37 cash (*Amount updated per Status Report filed 11/12/15*)

Executor (Statutory): $14,171.36

Attorney Bruce A. Neilson (Statutory): $14,171.36

Attorney Bruce A. Neilson (Extraordinary): $1,000.00 (for services in connection with the sale of the Visalia commercial real property, pursuant to Local Rule 7.18.A.)

Attorney Scott Ivy (Extraordinary): $62,049.28 (for services in connection with the litigation filed against Petitioner and this estate, pursuant to declaration and itemization at Exhibit B) **Petitioner has already paid said attorney compensation from her own funds and requests reimbursement from the estate**.

Closing: $2,500.00

Petitioner states because there insufficient funds in the estate to pay the executor and attorney's fees in full, Petitioner and her attorney will accept a prorated portion of the cash remaining in the estate after the reserve tor taxes and closing expenses is deducted. Any unused portion of the reserve after the above payments shall be distributed in equal shares to the residuary beneficiaries.

Distribution pursuant to Decedent's will:
Steven Thomas: Real property in Mariposa (specific bequest, distributed per Order on 2/27/15)

Petitioner states after payment of the expenses of administration as set forth above there does not appear to be any remaining cash for distribution to the beneficiaries. Any remaining cash assets after closing expenses, attorney's fees and executor's fees are paid will be divided in equal shares to Janette Courtney, David A. Thomas, Joanne E. Dawson, and Sandra L. Thompson.

SEE ADDITIONAL PAGES

NEEDS/PROBLEMS/ COMMENTS:

Note: Trial on this matter was held on 6/30/15 in Dept. 21. Pursuant to the Court's *Ruling After Hearing on Objections to First And Final Accounting* entered 8/5/15, the objections were overruled except for the claim that petitioner has failed to properly account for and disclose the bank account held by the decedent at the time of her death at JP Morgan Chase Bank and/or the proceeds of that account withdrawn in August 2012. The petition was remanded to Probate for further proceedings consistent with this ruling.

Therefore, this matter was reset for 11/16/2015 pursuant to Notice of Hearing Setting, mailed to Attorney Neilson on 10/8/15.

SEE ADDITIONAL PAGES

Reviewed by: skc
Reviewed on: 12/21/15
Updates:
Recommendation:
File 3 - Drummond

Note: Summary of Objections, etc., has been removed from these Examiner Notes due to the Rulings.

Note: In addition to the above-referenced *Ruling After Hearing on Objections to First And Final Accounting* entered 8/5/15, Judge Ellison also signed an *Order After Hearing*, entered 11/12/15, which approves the Petition except as stated (re Chase account) and remands back to the Probate Court for further proceedings.

Status Report by Attorney filed by Bruce A. Neilson on 11/12/15 states a copy of the Order After Hearing. Also filed concurrently is a Dec**laration of Janette Courtney concerning the Chase Bank account** which was the only matter left undetermined, and a **Supplemental Declaration updating the cash on hand**; also accompanying the declaration is a revised proposed order for distribution in this matter.

Minute Order 11/16/15 states: Matter is continued due to the insufficient notice; Mr. Neilson is to re-notice all parties with the new date.

As of 12/21/15, nothing further has been filed. The following issues remain noted:

NEEDS/PROBLEMS/COMMENTS:

1. **Need Notice of Hearing and proof of service of same on all interested parties of this re-set hearing pursuant to applicable code and Notice of Hearing Setting mailed to Attorney Neilson on 10/8/15.**

2. **Declaration of Janette Courtney Regarding Chase Bank Account filed 11/12/15 states this is an account her mother had told her she closed out. She received no statements on this account after her mother's death and believed it to be closed. Upon further inquiry, she received a written response from Chase confirming the account was closed long ago with a zero balance. Attached letter and statement from Chase Bank state the account was closed as of 8/14/12.**

   Based on the above-referenced rulings, the Court may require further information, such as the balance on the decedent's date of death, which was 6/9/11, and accounting for the time between the date of death and the zero balance statement on 8/14/12.

3. **The revised proposed order submitted by Attorney Neilson appears to contain typos at #3, #6, and #7 on Page 3, and similar typos in the closing paragraph on Page 4. Also, given the above-noted issues, the Court may require further revised order.**

4 **Alisha Ivy Gonzales (GUARD/P)** **Case No. 11CEPR00959**

Guardian **Gonzales, Sandra (pro per – Petitioner)**

Petition for Termination of Guardianship

Cont. from		
	Aff.Sub.Wit.	
✓	**Verified**	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	x
	Aff.Mail	x
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
✓	**CI Report**	
	9202	
✓	**Order**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

SANDRA GONZALES, paternal grandmother/Guardian, is Petitioner. She was appointed Guardian of the minor on 01/04/12.

Father: **SERGIO GONZALES**

Mother: **LYDIA ROMERO**

Paternal grandfather: SERGIO ANAYA

Maternal grandfather: ARMANDO ROMERO
Maternal grandmother: MARINA TORRES

Petitioner states the father has been released from incarceration and has resumed caring for the child.

Court Investigator filed a report on 12/11/15.

NEEDS/PROBLEMS/COMMENTS:

1. Need *Notice of Hearing*.

2. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:
   a. Lydia Romero (mother)
   b. Sergio Gonzales (father)
   c. Sergio Anaya (paternal grandfather)
   d. Armando Romero (maternal grandfather)
   e. Marina Torres (paternal grandmother)

Reviewed by: JF

Reviewed on: 12/17/15

Updates:

Recommendation:

File 4 - Gonzales

Dept. 303, 9:00 a.m. Monday, January 4, 2016

5 Wilfred Carl Mell (Estate) Case No. 12CEPR00225

Attorney: Randolf Krbechek

First Amended First and Final Account and Report of Executor and Petition for its Settlement for Allowance of Attorneys' Fees' and for Final Distribution

DOD:				NEEDS/PROBLEMS/COMMENTS:
Cont. from				**Continued to 1/19/16** at the request of the attorney.
	Aff.Sub.Wit.			
	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 12/17/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 5 - Mell

6 Mark Carlson Lee (CONS/PE) Case No. 12CEPR00343

Attorney: L. Kim Aguirre (for Conservatee)
Attorney: Heather H. Kruthers (for Petitioner/Conservator of the Person and former Conservator of the Estate)

Petition for Appointment of Successor Probate Conservator

Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
	Letters	X	
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
	CI Report	X	
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

TEMPORARY EXPIRES 1/4/2016

PUBLIC GUARDIAN, conservator of the person former conservator of the estate, is petitioner and requests **MATT BICKEL** be appointed as successor Conservator of the Estate with bond.

NEEDS/PROBLEMS/COMMENTS:

1. Petition requests bond but does not include the amount of said bond. Pursuant to Probate Code §2320 bond should be set at $112,980.00.

2. Need proof of personal service on Conservatee Mark Carlson Lee. (Declaration of Due Diligence filed on 12/16/15 states service was unsuccessful because Atascadero State Hospital will not allow anyone to serve a prisoner or patient at the hospital. Atascadero will not even tell them if he is a prisoner or patient at the hospital and the legal division at the hospital is not willing to do the service.)

3. Notice to several relatives of Mr. Lee were served at confidential addresses. Need authority that allows addresses to be confidential in probate matters.

4. Need Letters.

Reviewed by: KT
Reviewed on: 12/18/15
Updates:
Recommendation:
File 6 - Lee

7 Gloria Ann Oh (Estate) Case No. 12CEPR00973

Atty Romans, Stephanie N. (pro per – Administrator/Petitioner)

(1) Verified Supplement for First Account and Report of Personal Representative and Petition for Final Distribution (treated as an amendment/supplement to the Request for Waiver of Account and Report of Personal Representative and Petition for Final Distribution)

DOD: 09/24/12		
Cont. from 092514. 101414 , 041315, 050415, 091415		
	Aff.Sub.Wit.	
✓	Verified	
✓	Inventory	
✓	PTC	
✓	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	w/o
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	04/30/13
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
✓	9202	
	Order	x
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
✓	FTB Notice	

STEPHANIE N. ROMANS, Administrator, is Petitioner.

Account period: **09/14/12 – 12/12/14**

Accounting - **$310,000.00**
Beginning POH- **$310,000.00**
Ending POH - **$52,079.74** (all cash)

Administrator - **waived**

Attorney - **n/a**

Costs - **$2,013.50**

Administrator reimbursement -
$10,371.66 (funeral expenses)
$1,130.00 (mortgage payments)

Richard W. Oh, Sr. - **$5,122.50** (for mortgage payments)

Petitioner states that it was initially the intent of the beneficiaries that the real property assets of the estate were to remain in the family. The parties agreed that Nicholas Oh and Jacob Oh would file disclaimers that would allow Stephanie Romans to be the sole heir of the two properties, but Nicholas and Jacob would be occupants of the properties. However, there was a verbal agreement between Petitioner, Nicholas and Jacob that if the properties were sold, then each beneficiary would receive an equal share of the proceeds. Since the properties were sold, Petitioner proposes to distribute an equal share to Nicholas and Jacob despite the disclaimers they filed.

Distribution, pursuant to intestate succession is to:

Nicholas Oh - $8,360.52
Jacob Oh - $8,360.52
Stephanie Romans - $8,360.52
Richie Caleb Oh (minor)- $8,360.52 (to be placed in a blocked account until the minor reaches age 18)

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 09/14/15
Minute Order from 09/14/15 states: Continued due to the defects listed in the Examiner's notes; Petitioner requests time to research how to cure the items.

As of 12/16/15, nothing further has been filed and the following notes remain:

1. Beneficiaries Nicholas and James Oh filed Disclaimers disclaiming their share of the estate on 05/28/13 but Petitioner is now requesting to distribute the property to them. Need clarification. Also, disclaimers pursuant to Probate Code 282 have the effect as if the person disclaiming interest had predeceased the decedent, therefore Nicholas and James' share would be distributable to their issue.
2. Petitioner requests to be reimbursed for costs in the amount of $2,013.50. Need itemization of these costs.
3. Petitioner requests reimbursement for funeral expenses in the amount of $10,371.66 and mortgage payments in the amount of $1,130.00, however, no Creditor's Claim was filed and no itemization or further breakdown of the requested reimbursement is provided. Further, a copy of the Supplement for Final Account was not mailed to the beneficiaries which would inform them of the requested reimbursements and the amounts to be distributed. Need itemization of requested amounts.
4. Need date of birth for minor beneficiary Richie Caleb Oh.
5. Need revised Order.

Reviewed by: JF

Reviewed on: 12/16/15

Updates:

Recommendation:

File 7 - Oh

8 **Ila Mullennix (Estate)** **Case No. 12CEPR01077**

Atty **Flanigan, Philip M. (for John T. Laettner – Executor)**

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 01/16/2005		
Cont. from 032814, 033015, 111615		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

JOHN T. LAETTNER, son, was appointed Executor with full IAEA authority without bond on 01/23/2013.

Letters issued 01/29/2013.

Inventory and Appraisal filed 07/10/2013 shows a value of $12,892.00.

Status Report (for Hearing date of 03/30/2015) filed 03/09/2015 John T. Laettner needed to be appointed as Executor of the decedent's estate in order to receive assets from the ancillary probate in Nebraska. The sole asset in the Nebraska probate is an interest in mineral rights, and these rights have been the subject of a quiet title action. The initial trial court ruling on 08/06/2013, and the later final "appealable" order issued on 01/16/2015, were not in favor of the decedent. An appeal has been filed with the Nebraska Court of Appeals, case number A-15-00073. Counsel in the quiet title action estimates that it will be approximately six months before a final determination is made on appeal.

Wherefore, counsel respectfully requests a one year continuance to allow a final determination of the appeal and completion of the ancillary probate proceeding.

Declaration of Danielle R. Guerrero and Status Report (for hearing date of 11/16/2015) filed 11/13/2015 states John T. Laettner needed to be appointed as Executor of the decedent's estate in order to receive an interest in mineral rights in Nebraska that were the subject of a quiet title action. The initial trial court ruling on 08/06/2013, was not in favor of Mr. Laettner and the appeal filed with the Nebraska Court of Appeals, case number A-1500073, was denied. A petition to close a no-asset estate has been prepared and counsel is waiting on the receipt of the verification page from petitioner. It is respectfully requested that this matter be continued to 45 days pending the receipt of verification and filing of the petition.

NEEDS/PROBLEMS/COMMENTS:

Minute Order of 11/16/2015: If the petition is not filed by 01/04/2016, then John T. Laettner is ordered to be personally present in court or by CourtCall on 01/04/2016, and the Court will consider removal on that date.

1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.

Reviewed by: LV

Reviewed on: 12/16/2015

Updates:

Recommendation:

File 8 – Mullennix

9 2013 Walter Edward Eastwood Revocable Trust Case No. 14CEPR00069

Attorney LeVan, Nancy J. (for Susan Brown – Trustee – Petitioner)

Amended First and Final Account of Trustee; Petition for Allowance of Fees for her Attorney; Reimbursement to Trustee for Out of Pocket Expenses Petition; Reimbursement of Labor and Materials and for Distribution and Termination of the Trust

DOD: 3/21/14		
Cont. from 082615, 093015, 111615		
	Aff.Sub.Wit.	
✓	**Verified**	
	Inventory	
	PTC	
	Not.Cred.	
✓	**Notice of Hrg**	
✓	**Aff.Mail**	w
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	**Order**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

SUSAN BROWN, Trustee with bond of $74,000.00, is Petitioner.

Account period: 8/23/13 – 4/4/15
Accounting: $236,090.27
Beginning POH: $205,417.82
Ending POH: $111,831.88 (cash)

Trustee (Reimbursement): $6,211.02
Petitioner states the total amount of deposits made to the trust account by Susan Brown is $8,450, and Petitioner also paid administrative expenses totaling $4,161.02. The amount that has been repaid to Susan Brown during the course of administration is $5,600.00. The remaining balance owing to Susan Brown is $6,211.02. Declaration details extensive work required on the residence and the benefit to the estate of such work performed by family, etc.

Buyers: $3,488.98. Petitioner states the decedent's home was sold to the Kerbys, who purchased materials and provided labor to bring the home up to code into a condition where it could be sold. In addition to what the trust has paid them up to this point, the trustee requests authorization to pay the Kirbys an additional $3,488.98. Declaration provides itemization, explanation.

Attorney: $1,500.00

Declaration filed 11/13/15 revises the request for distribution after payment of the requested reimbursement, preliminary distribution, reimbursement to buyers, and attorney fees will be $15,126.37 each to Susan Brown, Cynthia Taylor, Gregory Eastwood, Rebecca Garrison, and Lori Eastwood, and termination of the trust.

NEEDS/PROBLEMS/COMMENTS:

1. **Need revised proposed order, which should specify the revised final distribution amount to each beneficiary by name. (The proposed order provided indicates $21,214.13 "to the five beneficiaries," which amo0nt does not appear to have been revised pursuant to the declaration and preliminary distributions.)**

Reviewed by: skc
Reviewed on: 12/21/15
Updates:
Recommendation:
File 9 – Eastwood

10A Willie Young (Estate) Case No. 14CEPR00420

Attorney: Elise M. Balgley of Newark, CA (for Petitioner Howard Young)

Report of Sale and Petition for Order Confirming Sale of Real Property

DOD: 6/17/13		
Cont. from 110315		
	Aff.Sub.Wit.	
✓	**Verified**	
	Inventory	
	PTC	
	Not.Cred.	
✓	**Notice of Hrg**	
✓	**Aff.Mail**	W/O
✓	**Aff.Pub.**	
✓	**Sp.Ntc.**	W/O
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	X
✓	**Aff. Posting**	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

HOWARD YOUNG, Administrator with limited IAEA authority, is petitioner.

Sale price - $75,000.00
Overbid - $79,250.00

Reappraisal - Need

Property - 321 S. 38th Street, Richmond, CA

Publication - Contra Costa News Register

Buyers - Ramir R. Milay and Germaine Willkom-Milay

Broker - $3,000.00 (4% - payable to Preferred Brokers Wanda Thompson

NEEDS/PROBLEMS/COMMENTS:

Continued from 11/3/15. As of 12/17/15 the following issues remain:

1. Need proof of service of the Notice of Hearing on buyers Ramir R. Milay and Germaine Willkom-Milay pursuant to Probate Code §10308(c).
2. Proof of service does not indicate that the Notice of Hearing was served with a copy of the petition as required by Probate Code §1252 to Steven Diebert and Sheryl Noel pursuant to their Requests for Special Notice.
3. Need reappraisal for sale. Probate Code §10309(a)(1).
4. #4a of the petition does not state the manner of vesting title.
5. Petition does not address whether or not the funds will be bonded or blocked.
6. Need Order.

Reviewed by: KT

Reviewed on: 12/17/15

Updates:

Recommendation:

File 10A– Young

Dept. 303, 9:00 a.m. Monday, January 4, 2016

10B Willie Young (Estate) Case No. 14CEPR00420

Attorney: Sheryl D. Noel (for Administrator Howard Young)

Probate Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD: 6/17/13		
Cont. from 091415, 111615		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

HOWARD YOUNG was appointed Administrator with limited IAEA and without bond.

Letters issued on 9/5/14.

Inventory and Appraisal filed on 2/13/15 showing the estate valued at $150,000.00

Minute order dated 7/14/14 set this status hearing re: filing of the first account or petition for final distribution.

First account or petition for final distribution is now due.

Former Status Report filed 11/03/15 states: The Estate's sole asset is real property located in Richmond, CA. A report of Sale and Petition for Order Confirming Sale of the sole asset is now scheduled for 01/04/16. Petitioner is working with the probate referee to have the necessary updated appraisal of the property completed. The sale is being re-noticed taking into account the value the probate referee has tentatively placed on the property. Petitioner is taking all the necessary steps to obtain the highest possible sale price for the property. Once the sale of the property is concluded, the estate will be in a position to be closed.

NEEDS/PROBLEMS/COMMENTS:

1. **Need first account, petition for final distribution or current written status report** pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code

Reviewed by: KT

Reviewed on: 12/17/15

Updates:

Recommendation:

File 10B – Young

Dept. 303, 9:00 a.m. Monday, January 4, 2016

11 Gloria Andrade (CONS/PE) Case No. 14CEPR00543

Attorney **J. Stanley Teixeira (for Conservator Tracy Cerda)**

Probate Status Hearing Re: Filing of the First Account

Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

TRACY CERDA, daughter, was appointed Conservator of the Person and Estate with medical consent and dementia powers on 8/4/2014.

***Letters* issued 1/23/2015** following filing of an *Amended Order Appointing Probate Conservator* filed 1/22/2015.

Pursuant to Probate Code § 2620(a), first account is due 1/23/2016.

***Minute Order* dated 8/2/2014** from the hearing on the petition for appointment set this status hearing on 1/4/2016 for the filing of the first account of the conservatorship.

NEEDS/PROBLEMS/COMMENTS:

1. Need first account of the conservatorship estate, or a verified status report and proof of service of notice of the status hearing with a copy of the status report to all interested parties pursuant to Local Rule 7.5(B).

Note: Due to the delay in filing proof of blocked account, and the *Letters* having issued on 1/23/2015, the first account is not yet due pursuant to Probate Code § 2620(a). Continuance of this status hearing may be necessary to allow additional time for filing of the first account.

Reviewed by: LEG
Reviewed on: 12/16/15
Updates:
Recommendation:
File 11 – Andrade

Dept. 303, 9:00 a.m. Monday, January 4, 2016

12 Jasean Bess & Jashaya Sumlin (GUARD/P) Case No. 14CEPR00806

Petitioner **Bess, Jezell (Pro Per – Mother – Petitioner)**
Guardian **Bess, Courtney Lynn (Pro Per – Maternal Aunt – Guardian of Jasean)**
Guardian **Robinson, Breshia (Pro Per – Maternal Great-Aunt – Guaridan of Jashaya)**

Review Hearing

			COURTNEY LYNN BESS, Maternal Aunt, was appointed guardian of Jasean, and **BRESHIA ROBINSON**, Maternal Great-Aunt, was appointed guardian of Jashaya, on 12/3/14. On 9/15/15, **JEZELL BESS**, Mother, filed a Petition for Visitation, which was heard on 10/26/15. **BRESHIA ROBINSON** filed an Objection to the petition on 10/19/15. **Minute Order 10/26/15 states**: The Court orders that Breshia Robinson not allow Jashaya to call her "Mom." The Court orders supervised visitation for Jezell Bess with both minors, supervised by the respective guardians, on Wednesdays and Fridays from 5pm to 7pm at the Chuck E. Cheese on Blackstone and Nees starting on 10/28/15. If Jezell Bess is more than 15 minutes late for any visit, then she loses that visit, and she is to provide 48 hours notice to the guardians should she be unable to come to a visit. On 11/27/15 and 12/25/15, the visits shall be from noon to 5pm, not at a restaurant but at a mutually agreed upon location. Parties may mutually agree as to different days and times for the visits.	**NEEDS/PROBLEMS/COMMENTS:**
	Aff.Sub.Wit.			
	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			**Reviewed by:** skc
	Status Rpt			**Reviewed on:** 12/21/15
	UCCJEA			**Updates:**
	Citation			**Recommendation:**
	FTB Notice			**File 12- Bess & Sumlin**

13 Addie Jane Phelps (Estate) Case No. 14CEPR00913

Attorney **Melvin M. Richtel (for Crystal A. Nunes, Executor)**

Probate Status Hearing Re: First and/or Final Accounting

DOD: 4/30/2014			NEEDS/PROBLEMS/COMMENTS:
			OFF CALENDAR
Cont. from			***Waiver of Accounting and Petition for Final Distribution* filed 12/11/2015 is set for hearing on 2/3/2016.**
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		**Reviewed by:** LEG
	Status Rpt		**Reviewed on:** 12/16/15
	UCCJEA		**Updates:**
	Citation		**Recommendation:**
	FTB Notice		**File 13- Phelps**

Dept. 303, 9:00 a.m. Monday, January 4, 2016

14A Nathan Finney, Breanna Finney & Rikki Finney (GUARD/P)

Case No. 15CEPR00122

Petitioner Alvarez, Chantelle (Pro Per – Aunt – Petitioner)

Petition for Termination of Guardianship

			See petition for details.
Cont'd from: 101915			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/ COMMENTS:

Page A - Petition for Termination of Guardianship with Tennison Finney, Step-Mother.

Page B - Petition for Guardianship with Chantell Alvarez, Paternal Aunt.

Reviewed by: skc

Reviewed on: 12/22/15

Updates:

Recommendation:

File 14A - Finney

Dept. 303, 9:00 a.m. Monday, January 4, 2016

14B Nathan Finney, Breanna Finney & Rikki Finney (GUARD/P)

Case No. 15CEPR00122

Petitioner Alvarez, Chantelle (Pro Per – Aunt – Petitioner)

Petition for Appointment of Guardian of the Person

			See petition for details.
Cont'd from: 101915			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	w	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/ COMMENTS:

Reviewed by: skc

Reviewed on: 12/22/15

Updates:

Recommendation:

File 14B - Finney

Dept. 303, 9:00 a.m. Monday, January 4, 2016

15 Joyce Gailene Richardson (Estate) Case No. 15CEPR00182

Attorney Bruce, Daniel A. (for Robert Baker – Administrator)

Order to Show Cause – Pre RE: Failure to File the Inventory and Appraisal

DOD: 01/13/15		
Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	x
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

ROBERT BAKER, son, was appointed Administrator with no IAEA authority and without bond on 06/08/15. Letters of Administration were issued on 06/22/15.

Minute Order from hearing on 06/08/15 set the matter for a Status Hearing regarding filing of the Inventory & Appraisal on 11/19/15.

Minute Order from hearing on 11/09/15 states: NO APPEARANCES – The Court issues an Order to Show Cause to Daniel Bruce as to why he should not be sanctioned for failure to appear, and to Robert Baker as to why he should not be removed as Administrator for failure to file the Inventory & Appraisal. Mr. Bruce and Robert Baker are both ordered to be personally present in court or via CourtCall on 01/04/16.

Clerk's Certificate of Mailing attached to 11/09/15 Minute Order states that a copy of the 11/09/15 Minute Order was mailed to Daniel Bruce and Robert Baker on 11/09/15.

NEEDS/PROBLEMS/COMMENTS:

1. Need Inventory & Appraisal.

Reviewed by: JF

Reviewed on: 12/17/15

Updates:

Recommendation:

File 15- Richardson

Dept. 303, 9:00 a.m. Monday, January 4, 2016

16 Sharon K. McCurn (CONS/PE) Case No. 15CEPR00221

Petitioner **Anthony McCurn, Sr. (Pro Per)**

Petition for Appointment of Probate Conservator of the [Estate only]

			ANTHONY McCURN, SR., spouse and Conservator of the Person appointed on 4/16/2015, is Petitioner and requests appointment as Conservator of the Estate without bond, and with Probate Code § 2590 powers.
Cont. from			
	Aff.Sub.Wit.		
✓	**Verified**		
	Inventory		***~Please see Petition for details~***
	PTC		
	Not.Cred.		
✓	**Notice of Hrg**		***~Please see additional page~***
✓	**Aff.Mail**	W/	
	Aff.Pub.		
	Sp.Ntc.		
✓	**Pers.Serv.**		
✓	**Conf. Screen**		
✓	**Letters**		
✓	**Duties/Supp**		
	Objections		
✓	**Video Receipt**	Filed 4/8/15	
✓	**CI Report**		
	9202		
✓	**Order**		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	**Citation**		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS:

Note: Petitioner was appointed Probate Conservator of the Person with medical consent powers on 4/16/2015.

Court Investigator Advised Rights on 12/11/2015.

1. Need proof of service by mail of the Notice of Hearing with a copy of the *Petition for Appointment of Probate Conservator* showing notice was mailed at least 15 days before the hearing for **DEDRIC CHERRY**, grandchild, pursuant to Probate Code § 1822(b)(2), who is listed in *Attachment 11* but who is not listed on the *Proof of Service by Mail* filed 11/23/2015.

~Please see additional page~

Reviewed by: LEG

Reviewed on: 12/16/15

Updates: 12/21/15

Recommendation:

File 16- McCurn

Dept. 303, 9:00 a.m. Monday, January 4, 2016

16 Additional Page, Sharon K. McCurn (CONS/PE) Case No. 15CEPR00221

Petitioner requests the Court grant Probate Code § 2590 powers in order to obtain a loan modification on the family residence held in joint tenancy pursuant to Probate Code § 2591, due to the loss of his wife's income when she became disabled and reduction of Petitioner's work hours, making it difficult for the household to keep up with the mortgage payment.

Petitioner additionally requests that the Court waive an (a) inventory and appraisal; and (b) accountings as long as the estate meets the requirements of Probate Code § 2628.

Court Investigator's *Report* was filed 12/18/2015.

NEEDS/PROBLEMS/COMMENTS, continued:

2. *Attachment 1(c)* to the *Petition* states the Petition is for a small estate and therefore, no bond is required. Bond is required pursuant to Probate Code § 2320 and CA Rule of Court 7.207. Probate Code § 2321 provides the Court may not waive bond without a good cause determination that the Conservatee will not suffer harm as a result of the waiver. Probate Code § 2323 provides the Court may dispense with the requirement of a bond if it appears likely that the estate will satisfy the conditions of § 2628(a) for waiver of accountings based on receipt of public benefits payments. If Court does not waive bond, need Petitioner to post bond of **~$9,600.00**.

3. Need Attachment 3(i) to proposed letters containing the same language contained in Attachment 29 of the proposed order, granting the very specific authority to apply for and obtain loan modifications on the family residence in an attempt to reduce the risk of foreclosure.

Note: Petitioner requests the Court waive an inventory and appraisal. Probate Code § 2610(a) provides that within 90 days after appointment, the conservator shall file an inventory and appraisal of the estate made as of the date of the appointment of the conservator. If appointed as conservator of the estate, Petitioner is required to file with the Court an inventory and appraisal within 90 days after appointment.

Note: If *Petition* is granted, Court will set status hearings as follows:

- **Thursday, February 11, 2016 at 9:00 a.m. in Dept. 303** for filing proof of bond, if Court requires bond;
- **Thursday, May 12, 2016 at 9:00 a.m. in Dept. 303** for filing of inventory and appraisal; and
- **Thursday, March 17, 2017 at 9:00 a.m. in Dept. 303** for filing of first account of the conservatorship, if Court requires accountings.

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

17 **Henry Garcia Padilla (Estate)** **Case No. 15CEPR00285**

Petitioner **Padilla, Henry Michael, Jr. (Pro Per – Son – Petitioner)**
Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 12/7/14			**HENRY MICHAEL PADILLA, JR.**, Son, is Petitioner and requests appointment as Administrator with Full IAEA without bond. All heirs waive bond. Full IAEA – ok Decedent died intestate Residence: Fresno Publication: Business Journal Estimated value of estate: Personal property: $1,000.00 Real property: $155,000.00 Total: $156,000.00 Probate Referee: Rick Smith	**NEEDS/PROBLEMS/COMMENTS:** **Continued from 5/4/15, 7/20/15, 8/31/15, 9/28/15** **As of 12/21/15, nothing further has been filed. The following issues remain:** ***SEE PAGE 2*** **Note: If granted, the Court will set status hearings as follows:** • **Monday, June 6, 2016 for filing the Inventory and Appraisal** • **Monday, March 6, 2017 for filing the first account or petition for final distribution.** **If the proper items are filed prior to the status hearing dates pursuant to Local Rule 7.5, the status hearings may come off calendar.**
Cont. from 050415, 072015, 083115, 092815				
	Aff.Sub.Wit.			
✓	**Verified**			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	x		
	Aff.Mail	x		
✓	**Aff.Pub.**			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	**Letters**			
✓	**Duties/Supp**			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	**Order**			
	Aff. Posting			**Reviewed by:** skc
	Status Rpt			**Reviewed on:** 12/21/15
	UCCJEA			**Updates:**
	Citation			**Recommendation:**
	FTB Notice			**File 17 - Padilla**

Dept. 303, 9:00 a.m. Monday, January 4, 2016

Page 2 - NEEDS/PROBLEMS/COMMENTS:

Examiner Notes previously noted the following issue:

1. **Declaration of Michelle Nino filed 8/17/15 states she is one of two children of the decedent and waives NOTICE and also waives ANY INTEREST in the estate.**

   Ms. Nino's declaration appears to be an irrevocable disclaimer of interest as discussed in Probate Code §§ 265, 275 et seq.

   Pursuant to Probate Code §282, a disclaimer, when effective, is irrevocable and binding, and the disclaimed interest shall descend to the issue of the disclaimant as if the disclaimant had predeceased the decedent.

   Therefore, need clarification: Does Ms. Nino have issue that will now be heir(s) to her share of the estate? If so, need their information pursuant to #8 of the petition, and need waivers of bond from them. Note that bond cannot be waived if there are minor heirs.

On 9/22/15, Petitioner filed a Declaration noting that Probate Code §282(b)(1) contains an exception to the above-referenced situation, and states that if the beneficiary is not treated as having predeceased the decedent, there is no problem or issue as suggested and the case can go forward with his appointment as administrator and the probate case can proceed to its proper completion.

Examiner notes as follows:

§282(b)(1) states:

```
(b) Notwithstanding subdivision (a), where the disclaimer is filed
on or after January 1, 1985:
   (1) The beneficiary is not treated as having predeceased the
decedent for the purpose of determining the generation at which the
division of the estate is to be made under Part 6 (commencing with
Section 240) or other provision of a will, trust, or other
instrument.
```

§240 states:

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240.  If a statute calls for property to be distributed or taken in
the manner provided in this section, the property shall be divided
into as many equal shares as there are living members of the nearest
generation of issue then living and deceased members of that
generation who leave issue then living, each living member of the
nearest generation of issue then living receiving one share and the
share of each deceased member of that generation who leaves issue
then living being divided in the same manner among his or her then
living issue.
```

This exception has to do with level of division of shares, and not with who is entitled to take pursuant to disclaimers.

As explained in the annotated code commentary: This provision is designed to prevent an heir from disclaiming for the purpose of increasing the share of his or her line at the expense of the other line of descendants. For example: If the decedent had two children, one deceased with one child, and the other living with three children, the level of division remains at the child level (one-half shares). If the living child disclaims, the division remains in one-half shares, and does not revert to one-quarter shares because of the disclaimer at the expense of the child of the deceased heir. The deceased child's heir would still be entitled to his parent's one-half share, and the disclaimant's three children would then split their parent's one-half share.

Therefore, the section Petitioner cites does not apply to Petitioner's situation, and the issue above remains noted. If Ms. Nino's declaration is deemed a disclaimer by the Court, then need information regarding her issue for #8 of the petition and waivers of bond from all new heirs, or bond of $156,000.00.

18 In Re: The Restated Campbell Family Trust Case No. 15CEPR00474

Attorney **Schorling, Douglas D. (for Kevin S. Campbell – Beneficiary – Petitioner)**
Attorney **Roberts, Gregory J. (for Billie J. Campbell – Trustee – Respondent)**
Petition to Compel Trustee to Account

Jerry W. Campbell
DOD: 8/4/00

Cont from: 062215, 070615, 081715, 101915

	Aff.Sub.Wit.	
✓	**Verified**	
	Inventory	
	PTC	
	Not.Cred.	
✓	**Notice of Hrg**	
✓	**Aff.Mail**	w
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
✓	**Objections**	
	Video Receipt	
	CI Report	
	9202	
✓	**Order**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

KEVIN S. CAMPBELL, Beneficiary, is Petitioner.

Petitioner he is a beneficiary of **The Restated Campbell Family Trust** (The Trust) executed by **JERRY W. CAMPBELL and BILLIE J. CAMPBELL** on 3/16/95. The trust provides that upon the death of the first Trustor, the trust estate is to be divided into three trusts: Trust A, the Jerry W. Campbell Family Trust; Trust B, the Billie J. Campbell Family Trust; and Trust C, the Campbell QTIP Trust

The Trust appoints **BILLIE J. CAMPBELL** as trustee of all three trust, and appoints the trustors' two sons, **RANDALL D. CAMPBELL (DOD 1/4/07) and RICKY D. CAMPBELL (DOD 4/20/09), and DAVID ASH** as successor co trustees. As a result of the deaths of Randall D. Campbell and Ricky D. Campbell, David Ash is the sole successor trustee.

It is unclear to Petitioner whether Billie J. Campbell is still the trustee of the trusts. It is possible that she has resigned or has appointed David Ash as a co-trustee.

The trustors are also the trustors of **The Jerry W. Campbell and Billie J. Campbell Irrevocable Trust dated 3/28/91. DAVID ASH** is the trustee of the Irrevocable Trust.

Petitioner believes it is possible that Billie J. Campbell and David Ash have commingled assets between the Trust and the Irrevocable Trust.

Paragraph 2.1 of Section V of the Trust specifically requires the trustee to account. Neither Billie J. Campbell nor David Ash has made any report of information about the Trust nor any account of the Trust.

On 8/28/14, Petitioner mailed by certified mail a written demand for documentation including annual accountings, information under Probate Code §16060, 16061, 16060.7.

SEE ADDITIONAL PAGES

NEEDS/PROBLEMS/ COMMENTS:

Minute Order 10/19/15: Mr. Schorling represents that Mr. Roberts has provided a report which is being reviewed by an accountant. Counsel requests 60 days. If the matter is not resolved, a status report verified by Kevin Campbell is to be filed at least two court days prior to 1/4/16.

As of 12/21/15, nothing further has been filed.

Note: Declaration of Douglas D. Schorling in Response to Response to Petition was filed 6/29/15. See additional pages.

1. **Petitioner provides names and addresses of the "other beneficiaries;" however, Probate Code §17201 requires the petition to list of each person *entitled to notice*. Need complete list of each person entitled to notice in this proceeding, including Petitioner's own information.**

2. **Notice of Hearing filed *6/3/15* indicates service mailed on *July 29, 2015*. Need amended Notice of Hearing reflecting the correct service date.**

Reviewed by: skc
Reviewed on: 12/21/15
Updates:
Recommendation:
File 18- Campbell

Petitioner states the trustee has failed and refused to prepare and provide Petitioner with the requested account and has failed and refused to Provide Petitioner with any of the requested information and documentation. In addition, the Trustee never provided Petitioner with the required notice under §16061.7 upon the death of Jerry W. Campbell.

Attached to the petition are the Exhibit A – Restated Campbell Family Trust dated 3/16/95, Petitioner's Letter dated 8/28/14, and the certified mail return receipt for the Letter.

Petitioner prays for an order:

1. Compelling Billie J. Campbell and/or David Ash to prepare and file with this Court an account of the Trust since its commencement on 3/28/91, including copies of any and all documents that support, substantiate, or evidence any item set forth in the accounting. See petition for specifics re requested documentation;

2. Instructing Billie J. Campbell and/or David Ash to petition this Court for the settlement of the account and give notice of hearing on the petition;

3. Compelling Billie J. Campbell and/or David Ash to provide Petitioner with all information necessary under §06060 to keep the beneficiaries reasonably informed of the trust and its administration;

4. Compelling Billie J. Campbell and/or David Ash to provide Petitioner with information under §16061 to report to the beneficiary by providing the requested information relating to the administration of the trust relevant to the beneficiary's interest;

5. Compelling Billie J. Campbell and/or David Ash to provide Petitioner with the terms of the Trust, as required by §16060.7;

6. For such attorney fees and costs as may be allowable by law; and

7. For all other orders the court deems proper.

Response filed 6/8/15 by BILLIE J. CAMPBELL states:

- Respondent is the sole beneficiary and currently acting sole trustee of Trust B with power to amend and/or revoke Trust B, and as trustee, no duty to account to any other person of the financial transactions of Trust. B.

- No Trust C (QTIP Trust) was established pursuant to the death of Jerry W. Campbell as the trust had insufficient assets to require such establishment.

- Trust A was not subdivided into "Exempt Family Trust A" and "Non-Exempt Family Trust A" because there were no generation-skipping issues which would require such subdivision. Respondent is the lifetime sole beneficiary of Trust A and unless as trustee she determines to make discretionary distributions to others, the lifetime sole principal beneficiary of Trust A, the intention of Jerry W. Campbell being to provide first for the needs of his surviving spouse (see Trust). There is no distribution of Trust A assets required to be made to any beneficiary other than Respondent until Trust A is divided into separate shares upon her death.

SEE ADDITIONAL PAGES

Respondent states the duty of the trustee to account is to the beneficiaries of "their trust." Until the death of Respondent, no trusts are established for any beneficiaries other than Respondent. Consequently, Trustee currently has no duty to account to anyone other than Respondent of the transactions of any trust established under the Restated Campbell Family Trust.

To Respondent's belief, the administration of the Irrevocable Trust, of which Respondent was not a trustee, has been concluded.

Respondent has had to retain counsel to file this response and asks the Court to order Petitioner to reimburse the costs and fees incurred, as proven upon subsequent declaration of Gregory J. Roberts.

Respondent prays for an order:

1. That Respondent is the sole beneficiary of Trust B entitled to an accounting;
2. That Respondent was never a trustee of the Irrevocable Trust and has no obligation to account or participate in any accounting;
3. That Petitioner shall reimburse Respondent for the costs and attorney's fees she has incurred; and for
4. Such other and further relief as the Court deems proper.

Examiner's Note: The Irrevocable Trust is not before the Court at this time; therefore, the Court cannot make orders regarding Respondent's obligations in connection with the Irrevocable Trust.

Declaration of Douglas D. Schorling in Response to Response to Petition to Compel Trustee to Account filed 6/29/15 states under Probate Code §24, a "beneficiary" as it relates to a trust means a person who has any present or future interest, vested or contingent. Petitioner is clearly a beneficiary and is entitled to all of the rights granted to a beneficiary under the Probate Code. In her response, the trustee admits that Trust A is irrevocable, but take the position that the trustee has no duty to account because she is still alive. Not only is the trustee's position contrary to California law, it also ignores the fact that Petitioner has requested more than an accounting. Petitioner has requested the information to which he is entitled pursuant to §16060, 16060.7, 16061, and 16061.5. The trustee has also failed to provide notification as required by §16061.7 and is therefore liable under §16061.7 for all damages, attorney's fees, and costs caused by that failure. See declaration for authority. Declaration states Petitioner is entitled to the relief requested in the petition.

Petitioner is also sensitive to the fact that the trustee, who is his grandmother, apparently feels burdened by Petitioner's requests. Consequently, Attorney Schorling has advised counsel for the trustee that Petitioner is willing to forego an official accounting if the trustee is willing to provide the other information and documentation requested. To the extent any of the requested information is also available to third parties, such as financial institutions, the trustee is free to have the information provided directly to petitioner by such third parties rather than providing herself.

19 Patsy Lucille Barnes (Estate) Case No. 15CEPR00481

Attorney **Susan K. Arthur (for Petitioner Kevin L. Barnes)**

First Amendment to First and Final Account and Report of Executor and Petition for Its Settlement, for Allowance of Compensation for Ordinary and Extraordinary Services, and for Final Distribution

DOD: 11/7/2014		
Cont. from		
	Aff.Sub.Wit.	
✓	**Verified**	
✓	**Inventory**	
✓	**PTC**	
✓	**Not.Cred.**	
✓	**Notice of Hrg**	W /
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	061815
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
✓	**9202**	
✓	**Order**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
✓	**FTB Notice**	

KEVIN L. BARNES, son and Executor, is Petitioner.

Account period: 11/7/2014 – 10/30/2014

Accounting	-	**$117,988.67**
Beginning POH	-	**$110,250.00**
Ending POH	-	**$17,128.95** *(all cash)*
Executor *(statutory)*	-	**$4,532.16**
Executor XO *(Per Declaration attached as Exhibit I; for sale of real property, per Local Rule 7.18(B)(1); not requesting compensation for 182.2 hours of time expended for benefit of estate;)*	-	**$1,000.00**
Attorney *(statutory)*	-	**$4,532.16**
Attorney XO *(Local Rule 7.18(A) for sale of real property – see note at right;)*	-	**$1,000.00**
Executor Costs *(filing fee, probate referee, publication, certified copies)*	-	**$1,131.25**

Distribution pursuant to Decedent's Will is to:

KEVIN L. BARNES – $2,466.19 cash;

WESLEY ABBEY – $2,466.19 cash.

NEEDS/PROBLEMS/COMMENTS:

1. CA Rule of Court 7.53(a) provides an amendment to a pleading requires the same notice of hearing as the pleading it amends. Need *Notice of Hearing* and proof of service of notice for the *First Amendment to First and Final Account*, etc., filed 12/3/2015 pursuant to § 11000 for settlement of the account.

2. Paragraph 24 of the *Petition* requests the Petitioner be paid **$1,000.00** for extraordinary services in connection with the sale of real property, pursuant to Local Rule 7.18(B), which appears proper. In addition, Paragraph 25 of the *Petition* requests the attorney be paid **$1,000.00** for extraordinary services in connection with the sale of real property pursuant to Local Rule 7.18(A), which allows such fee for court-confirmed sales of real property. However, the distinction of court confirmation of the sale does not apply to the sale of the real property of the instant estate, as it was sold pursuant to the *Notice of Proposed Action* filed 8/17/2015 by Petitioner under IAEA authority without court confirmation. Court may require declaration in support of the attorney's extraordinary fee request pursuant to CA Rule of Court 7.702 - 7.703

Reviewed by: LEG

Reviewed on: 12/17/15

Updates:

Recommendation:

File 19- Barnes

20 Illiana Manriquez (GUARD/P) Case No. 15CEPR00884

Petitioner Manriquez, Karen P. (Pro Per – Paternal Grandmother)

Petition for Appointment of Guardian of the Person

			TEMPORARY EXPIRES 11/16/15	**NEEDS/PROBLEMS/COMMENTS:**
			KAREN P. MANRIQUEZ, Paternal Grandmother, is Petitioner.	**OFF CALENDAR. Order granting continuance to 1/5/16 signed on 12/17/15.**
Cont. from 111615				
	Aff.Sub.Wit.		**Please see Petition for details**	
✓	**Verified**			**Minute Order of 09/22/2015 (Temporary Hearing): Ms. Forker is to properly serve the declaration she filed. The Court orders visitation for Ms. Forker every Tuesday and every Saturday from 6pm to 7pm at the McDonald's at Willow and Nees, starting tonight.**
	Inventory			
	PTC			
	Not.Cred.			
✓	**Notice of Hrg**			1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: • Paternal Grandfather (Not Listed)
✓	**Aff.Mail**			
	Aff.Pub.			
	Sp.Ntc.			
✓	**Pers.Serv.**			
✓	**Conf. Screen**			
✓	**Letters**			
✓	**Duties/Supp**			2. Notice of Appearance of Counsel on Behalf of Karen P. Manriquez filed on 11/13/2015 by Attorney Jay A. Christofferson states he is counsel of record for petitioner. Need Substitution of Attorney on Mandatory Judicial Council Form – MC 050.
	Objections			
	Video Receipt			
✓	**CI Report**			
	9202			
✓	**Order**			**As to Courtney D. Forker, Mother:** 1. Need proof of service regarding declaration filed on 09/21/2015 pursuant to Minute Order of 09/22/2015.
	Aff. Posting			**Reviewed by:** LV
	Status Rpt			**Reviewed on:** 11/12/2015
✓	**UCCJEA**			**Updates:**
	Citation			**Recommendation:**
	FTB Notice			**File 20- Manriquez**

Dept. 303, 9:00 a.m. Monday, January 4, 2016

21 **Willie Lee (Det. Succ)** **Case No. 15CEPR00923**

Petitioner **Lee, Jackie Eileen (Pro Per – Daughter – Petitioner)**

Petition to Determine Succession to Real Property (Prob. Code §13150)

DOD: 8/1/15		
Cont'd from: 110215		
	Aff.Sub.Wit.	
✓	**Verified**	
✓	**Inventory**	
	PTC	
	Not.Cred.	
✓	**Notice of Hrg**	
✓	**Aff.Mail**	w/o
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	**Order**	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

JACKIE EILEEN LEE, Daughter, is Petitioner.

40 Days since DOD

No other proceedings

I&A: $95,160.00 ($60.00 cash plus a 100% interest in real property located at 3949 E. Lowe in Fresno and two vehicles)

Will dated 12/8/09 (witnessed 1/19/10) is a California Statutory Will that devises the residence as a specific gift to Petitioner Jackie Eileen Lee, $20.00 each to Michael Lee, Todd Lee, Willie Lee, Jr., Billy Lee, and Edward Lee, and the balance to Jackie Eileen Lee.

Petitioner requests Court determination that the real property passes to her pursuant to the Decedent's will.

Petitioner filed a Declaration on 11/2/15 in response to Examiner Notes. Petitioner states if the Court requires a filing fee, Petitioner requests she be allowed to make payments. Petitioner states the Examiner Notes are incorrect and that §13151 allows a successor to petition re the real property only without succession to personal property, and Petitioner purposely did not include any request for succession to the personal property. Those entitled to personal property can use an affidavit under §13100 to collect the personal property. No court order under this section is required. Petitioner states she has submitted a declaration regarding efforts to try to locate addresses for the missing heirs. (See Declaration filed 10/15/15.)

NEEDS/PROBLEMS/COMMENTS:

<u>Minute Order 11/2/15</u>: Examiner notes provided in open court. Todd Lee states he is present to contest the will and is directed to file a will contest if he wishes instead of raising the issue in open court.

As of 12/22/15, no objection to the petition has been filed.

<u>SEE ADDITIONAL PAGES</u>

Reviewed by: skc

Reviewed on: 12/22/15

Updates:

Recommendation:

File 21 – Lee

Dept. 303, 9:00 a.m. Monday, January 4, 2016

Page 2 – NEEDS/PROBLEMS/COMMENTS:

1. **Examiner Notes previously stated:** This petition was filed with a fee waiver. If assets are distributed pursuant to this petition (Estate value $95,160.00), the filing fee of $435.00 will be due prior to distribution. ***Declaration filed 11/2/15 requests to be allowed to make payments.***

2. **Examiner Notes previously stated:** The I&A includes cash, real property, and two vehicles. Attachment #11 requests only that the real property pass to Petitioner pursuant to the will. However, this leaves the cash bequests and vehicles outstanding. In this type of summary proceeding, all successors in interest must petition together for determination of the assets they are entitled to, and determination is made in one order. Assets cannot be left outstanding.

   Therefore, an amended petition together with Michael Lee, Todd Lee, Willie Lee, Jr., Billy Lee, and Edward Lee may be necessary.

   Alternatively, the Court may accept written receipts from the above people for their $20 bequests.

Declaration filed 11/2/15 states the above Examiner's Note misstates the law and is incorrect. Probate Code §13151 states only the successor to a particular item of property that is real property needs to petition the court. This petition may include personal property, but that is not required. Petitioner is only the successor to the real property which is specifically devised to her. She purposefully did not include any request for succession to any item of personal property. Those entitled to personal property can use an affidavit under §13100 to collect the personal property. It is not required to be included in this petition.

Examiner's Note: Examiner is not aware of any authority for leaving known, inventoried assets outstanding and granting only succession to the real property, as Petitioner suggests. Here, the bank account and two vehicles* (*see #3 below) have been inventoried and as such are before the Court.

3. **Upon further review:** Item No. 3 of the I&A Attachment No. 2 is *not actually a vehicle*, but rather appears to be a *loss claim* on a vehicle with the loss dated 1/29/15 (after the decedent's death). The Court may require further clarification regarding this inventory item. Note that the Inventory and Appraisal should provide date of death values for all assets.

4. **Petitioner's Declaration filed 11/2/15 states** she *does not, and is not required to,* request determination of succession to any of the personal property assets. However, Examiner notes that pursuant to the will, *Petitioner is the successor* to both the real *and personal property*. Therefore, need authority for specifically omitting known, inventoried assets that would pass to *this petitioner* under the will from this petition and order.

5. **Petitioner states** the addresses of the following relatives, one of whom is an heir, are unknown: Billy Lee, Jr., and Bertha Louise Lee. As noted above, the Court may require all heirs to participate in the petition, or may require a receipt from Billy Lee, and may require notice to Billy Lee and Bertha Louise Lee. ***Declaration filed 11/2/15 refers to Declaration of Due Diligence filed 10/15/15.***

6. **Upon further review: It does not appear that Jamie Davis Myers Bennett, who is a named Alternative Executor, was given notice of the hearing. Need notice to Jamie Davis Myers Bennett pursuant to Probate Code §§13153, 13152(a)(7).**

   Also, "Eddie Lee" is the second named Alternative Executor. Is this the same person as "Edward Lee," who is a beneficiary of a cash bequest under the will?

22 Brooke Romero, Micah Romero (GUARD/PE) Case No. 15CEPR01031

Petitioner Thomas, Karen Mae (Pro Per – Maternal Grandmother)
Petitioner Thomas, Gerald L (Pro Per – Maternal Step-Grandfather)

Petition for Appointment of Guardian of Person and Estate

Brooke Age: 17		
Micah Age: 16		
Cont. from		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	x
	Aff.Mail	x
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	x
✓	Conf. Screen	
✓	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	

TEMPORARY (PERSON ONLY) EXPIRES 01/04/2016

KAREN THOMAS, maternal grandmother, and **GERALD THOMAS,** maternal step-grandfather, are petitioners.

Please see petition for details

NEEDS/PROBLEMS/COMMENTS:

Minute Order of 10/28/2015: Examiner notes provided in open court; defects are to be cured before the general hearing.

The following issues have not been rectified:

1. General Petition indicates that Guardianship of the Estate is requested however the estimated value of the estate is zero. Petitioners do not provide any information regarding the reasons why a Guardianship of the Estate is needed. Need clarification.

Note: If a Guardianship of the Estate is requested then a separate Petition and Case file for each child is required for Guardianship of the Estate.

2. Need Notice of Hearing.

3. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for:
   - Jacqueline Renee Clark (Mother)
   - Brooke Romero (Minor)
   - Micah Romero (Minor)

Please see additional page

Reviewed by: LV

Reviewed on: 12/17/2015

Updates:

Recommendation:

File 22- Romero

Dept. 303, 9:00 a.m. Monday, January 4, 2016

4. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
    - Paternal Grandparents
    - Maternal Grandfather
    - Any siblings 12 and older

5. Need Guardianship Petition-Child Information Attachment, Mandatory Judicial Council Form GC-210(CA), for each child.
6. UCCJEA is incomplete. Need minors' residence information for the past 5 years.

23 **Jeremiah Coward (GUARD/P)** **Case No. 15CEPR01035**

Petitioner **BENJAMIN, GLENDA FAYE (pro per – maternal grandmother)**

Petition for Appointment of Guardian of the Person

Age: 7			**TEMPORARY EXPIRES 01/04/16**
			GLENDA FAYE BENJAMIN, maternal grandmother, is Petitioner.
			Father: **MICHAEL COWARD** – *personally served on 10/31/15*
Cont. from			Mother: **LATRESE BENJAMIN**
	Aff.Sub.Wit.		Paternal grandparents: UNKNOWN
✓	**Verified**		Maternal grandfather: VIRGIL BENJAMIN – *Consents and Waives Notice*
	Inventory		**Petitioner states** [see file for details].
	PTC		**Court Investigator Samantha Henson filed a report on 12/18/15**
	Not.Cred.		
✓	**Notice of Hrg**		
	Aff.Mail	x	
	Aff.Pub.		
	Sp.Ntc.		
✓	**Pers.Serv.**	w/	
✓	**Conf. Screen**		
✓	**Letters**		
✓	**Duties/Supp**		
	Objections		
	Video Receipt		
✓	**CI Report**		
	9202		
✓	**Order**		
	Aff. Posting		
	Status Rpt		
✓	**UCCJEA**		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS:

1. Need proof of service at least 15 days before the hearing of *Notice of Hearing* with a copy of the *Petition for Appointment of Guardian of the Person* or Consent & Waiver of Notice or Declaration of Due diligence for:
   a. Latrese Benjamin (mother) – *personal service required*
   b. Paternal grandparents – *service by mail ok*

Reviewed by: JF

Reviewed on: 12/17/15

Updates: 12/21/15

Recommendation:

File 23- Coward

Dept. 303, 9:00 a.m. Monday, January 4, 2016

24 Kymandre Norman (GUARD/P) Case No. 15CEPR01036

Petitioner **Franklin, Andrea (pro per – maternal grandmother)**

Petition for Appointment of Guardian of the Person

Age: 6		
Cont. from		
	Aff.Sub.Wit.	
✓	**Verified**	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	x
	Aff.Mail	x
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	x
✓	**Conf. Screen**	
✓	**Letters**	
✓	**Duties/Supp**	
	Objections	
	Video Receipt	
	CI Report	x
	9202	
✓	**Order**	
	Aff. Posting	
	Status Rpt	
✓	**UCCJEA**	
	Citation	
	FTB Notice	

NO TEMPORARY REQUESTED

ANDREA FRANKLIN, maternal grandmother, is Petitioner.

Father: **IKE NORMAN**

Mother: **AUNJELI KINGSBURY**

Paternal grandfather: UNKNOWN
Paternal grandmother: KIM NORMAN

Maternal grandfather: ERIC KINGSBURY

Petitioner states [see file for details].

Court Investigator Julie Negrete filed a report on – NEED REPORT.

NEEDS/PROBLEMS/COMMENTS:

1. Need *Notice of Hearing*.
2. Need proof of service at least 15 days before the hearing of *Notice of Hearing* with a copy of the *Petition for Appointment of Guardian of the Person* or Consent & Waiver of Notice or Declaration of Due Diligence for:
   a. Ike Norman (father) – *personal service needed*
   b. Aunjeli Kingsbury (mother) – *personal service needed*
   c. Paternal grandfather – *service by mail ok*
   d. Kim Norman – *service by mail ok*
   e. Eric Kingsbury (maternal grandfather) – *service by mail ok*
3. Need CI report and clearances – CI to provide.

Reviewed by: JF
Reviewed on: 12/18/15
Updates:
Recommendation:
File 24- Norman

Dept. 303, 9:00 a.m. Monday, January 4, 2016

25 Damien Moreno (GUARD/P) Case No. 15CEPR01048

Petitioner **Moreno, Jacibe Yasmin (pro per – maternal grandmother)**

Petition for Appointment of Guardian of the Person

Age: 1			**NO TEMPORARY REQUESTED**
			JACIBE YASMIN MORENO, maternal grandmother, is petitioner.
			Father: **UNKNOWN**
Cont. from			Mother: **LUZ CERVANTEZ MORENO**
	Aff.Sub.Wit.		Paternal grandparents: UNKNOWN
✓	**Verified**		Maternal grandfather: UNKNOWN
	Inventory		**Petitioner states** [see file for details].
	PTC		**Court Investigator Jennifer Daniel filed a report on 12/11/15.**
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail	x	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	x	
✓	**Conf. Screen**		
✓	**Letters**		
✓	**Duties/Supp**		
	Objections		
	Video Receipt		
✓	**CI Report**		
	9202		
✓	**Order**		
	Aff. Posting		
	Status Rpt		
✓	**UCCJEA**		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS:

4. Need *Notice of Hearing*.

5. Need proof of service at least 15 days before the hearing of *Notice of Hearing* with a copy of the *Petition for Appointment of Guardian of the Person* or Consent & Waiver of Notice or Declaration of Due Diligence for:
   f. Father – *personal service needed*
   g. Luz Cervantez Montes (mother) – *personal service needed*
   h. Paternal grandparents – *service by mail ok*
   i. Maternal grandfather – *service by mail ok*

Reviewed by: JF

Reviewed on: 12/18/15

Updates:

Recommendation:

File 25- Moreno

Dept. 303, 9:00 a.m. Monday, January 4, 2016

26 Ara Armen Bedrosian (CONS/P) Case No. 15CEPR01116

Attorney **Leigh W. Burnside; Summer A. Johnson (for Petitioners James Bedrosian, Jane Bedrosian, and Paul Bedrosian)**

Petition for Appointment of Probate Conservator

			NO TEMPORARY REQUESTED
			JAMES KENNETH BEDROSIAN, father, **JANE S. BEDROSIAN**, mother, and **PAUL DAVID BEDROSIAN**, brother, are Petitioners and request appointment as Limited Co-Conservators of the Person, with orders relating to the powers and duties of the proposed Limited Conservators under Probate Code § 2351.5 be granted, and orders limiting the civil and legal rights of the proposed Limited Conservatee.
Cont. from			
	Aff.Sub.Wit.		
✓	**Verified**		
	Inventory		
	PTC		
	Not.Cred.		
✓	**Notice of Hrg**		
✓	**Aff.Mail**	W/	***~Please see Petition for details~***
	Aff.Pub.		
	Sp.Ntc.		
✓	**Pers.Serv.**		**Court Investigator's *Report* was filed 12/18/2015.**
✓	**Conf. Screen**		
✓	**Letters**		
✓	**Duties/Supp**		
	Objections		
	Video Receipt	X	
✓	**CI Report**		
	9202		
✓	**Order**		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	**Citation**		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS:

1. Need *Conservatorship Video Viewing Certificate* pursuant to Local Rule 7.15.9(A).

Reviewed by: LEG

Reviewed on: 12/17/15

Updates: 12/21/15

Recommendation:

File 26- Bedrosian

Dept. 303, 9:00 a.m. Monday, January 4, 2016

27 Gerald House (Det. Succ) Case No. 15CEPR01146

Attorney Lyon, Robirda M (for Dana House Trustee of Gerald House Family Trust – Petitioner)

Petition to Determine Succession to Real Property

DOD: 07/14/2005			DANA HOUSE, TRUSTEE OF THE GERALD HOUSE FAMILY TRUST, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
			40 days since DOD	1. Pursuant to Probate Code §13152(c) a copy of the will must be attached to the petition, however the original will is attached. Original will is required to be deposited with the Clerk's office pursuant to Probate Code 8200.
Cont. from			No other proceedings	
	Aff.Sub.Wit.	s/p	I&A - $22,500.00	2. Need Declaration pursuant to Local Rule 7.12.5 regarding distribution to Intervivos Trust.
✓	Verified		Will dated: 01/21/2000 devises real property pass to the Gerald House Family Trust	
✓	Inventory			
	PTC		Petitioner requests Court determination that decedent's 25% interest in real property located at 10744 Estrella St., Del Rey, Ca. pass to the Gerald House Family Trust pursuant to decedent's will.	
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 12/21/2015
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 27- House

28 Kaylee Petrochilos (GUARD/P) Case No. 15CEPR01188

Petitioner Thompson, Richard (Pro Per – Great Uncle)
Petitioner Thompson, Heather (Pro Per – Aunt)

Petition for Appointment of Temporary Guardian of the Person

Age: 1		
Cont. from		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	x
	Aff.Mail	n/a
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	x
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	

GENERAL HEARING 02/08/2016

RICHARD THOMPSON, great uncle, and **HEATHER THOMPSON**, aunt, are petitioners.

Please see petition for details

NEEDS/PROBLEMS/COMMENTS:

1. Need Notice of Hearing.
2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
   - Mark Clemens Petrochilos (Father)
3. UCCJEA is incomplete. UCCJEA provides the child's residence from 2015 to present. Child was born 09/20/2014, need residence since birth.

Reviewed by: LV
Reviewed on: 12/18/2015
Updates:
Recommendation:
File 28- Petrochilos

Dept. 303, 9:00 a.m. Monday, January 4, 2016

29 Ariehn Brady, Annaleah Brady, and ABCD Brady (GUARD/P)

Case No. 15CEPR01190

Petitioner **Julie C. Jones (Pro Per - self-represented attorney)**

Petition for Appointment of Temporary Guardian of the Person

			TEMPORARY GRANTED EX PARTE EXPIRES 1/4/2016
Cont. from			
	Aff.Sub.Wit.		**General Hearing set for 2/9/2016**
✓	**Verified**		**JULIE C. JONES**, non-relative caretaker, is Petitioner.
	Inventory		***~Please see Petition for details~***
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	**Conf. Screen**		
	Letters	X	
✓	**Duties/Supp**		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
✓	**UCCJEA**		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS:

1. Pursuant to Probate Code 2250(e), need *Notice of Hearing* and proof of five (5) court days' notice by personal service of the *Notice of Hearing* with a copy of the *Petition for Appointment of Temporary Guardian*, or *Consent to Appointment of Guardian and Waiver of Notice*, or a *Declaration of Due Diligence* for:

- Ariel Urrea Nigh, mother;
- Gene Brady, father.

Reviewed by: LEG

Reviewed on: 12/18/15

Updates:

Recommendation:

File 29- Brady

Dept. 303, 9:00 a.m. Monday, January 4, 2016

Attorney Pascuzzi, Susan L. (for Janet S. Herman – Executor – Petitioner)

Petition for Settlement of First and Final Account; Petition for Final Distribution and for Allowance of Compensation for Ordinary Services

DOD: 2/1/15				NEEDS/PROBLEMS/COMMENTS:
				OFF CALENDAR
Cont'd from 121415				Order After Hearing 12/14/15 signed 12/21/15.
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 12/21/15
	UCCJEA			Updates:
	Citation			Recommendation:
✓	FTB Notice			File 30 - Herman