



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Notice of Motion and Motion to be Relieved as Counsel

DOD: 5/23/2005	JEFF S. SHEPARD , attorney for Administrator, VIVIAN WEST, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 09/09/14</u></p> <p>1. Need <i>Notice of Hearing</i> and proof of service of <i>Notice of Hearing</i> for Vivian West.</p>
	VIVIAN WEST was appointed Administrator on 08/23/05 without bond.	
Cont. from 041014, 061214, 073114, 81214, 090914	Letters were issued on 08/24/05.	
<input type="checkbox"/> Aff.Sub.Wit.	Inventory & Appraisal showing the value of the estate at \$190,700.00 was filed 12/12/05.	
<input checked="" type="checkbox"/> Verified	Petitioner states that Vivian West has ceased all contact with his office. All correspondence and telephone calls have been ignored. Petitioner states that he has sent numerous letters to Ms. West regarding her duties as the personal representative of her mother's estate, but none of the letters have been acknowledged and the most recent letters have been returned as undeliverable. Petitioner states that he cannot continue as attorney for Vivian West due to her lack of cooperation and failure to perform her duties as administrator of the estate.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	x	
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order	Proof of Service filed 04/04/14 indicates that the Notice of Motion and Motion to be Relieved as Counsel and Declaration in Support of Attorney's Motion to be Relieved as Counsel – Civil was mailed to the Administrator at 3 different addresses.	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 12/19/14
		Updates:
		Recommendation:
		File 1A – Baker-Melton

**Amended/Corrected First and Final Account and Report of Administration,
 Petition for Final Settlement, for Allowance of Statutory Fees to Attorney and Final
 Distribution**

DOD: 05/23/05	JEFF S. SHEPARD , attorney for Vivian West, Administrator, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. The Petition indicates that Vivian West is in possession of all estate assets and Petitioner has lost contact with her and that there is no property on hand to distribute. The Petition does not address how payment of the statutory fees is to be accomplished. The Court may require more information. 2. Need Order.	
	Account period: 08/23/05 – 05/15/13			
Cont. from	Accounting	-		\$195,950.62
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH	-		\$190,700.00
<input checked="" type="checkbox"/> Verified	Ending POH	-		\$0.00
<input checked="" type="checkbox"/> Inventory	Administrator (statutory)	-		\$6,721.00
<input checked="" type="checkbox"/> PTC	Attorney (statutory)	-		\$6,721.00
<input checked="" type="checkbox"/> Not.Cred.	Closing	-		\$1,000.00
<input checked="" type="checkbox"/> Notice of Hrg	Distribution, pursuant to intestate succession, is to:			
<input checked="" type="checkbox"/> Aff.Mail w/	Vivian West - 100% -			
Aff.Pub.	Petitioner states that to his knowledge, all assets of the estate are in the possession of the Administrator			
Sp.Ntc.				
Pers.Serv.				
Conf. Screen				
Letters 08/24/05				
Duties/Supp				
Objections				
Video Receipt				
CI Report				
<input checked="" type="checkbox"/> 9202				
Order x				
Aff. Posting				
Status Rpt				
UCCJEA				
Citation				
FTB Notice n/a				
			Reviewed by: JF	
			Reviewed on: 12/19/14	
			Updates:	
			Recommendation:	
			File 1B – Baker-Melton	

(1) First and Final Report of Special Co-Administrators and Co-Administrators on Waiver of Account and (2) Petition for Allowance of Compensation to Co-Administrators and Attorney for Ordinary Services, (3) for Allowance of Compensation to Attorney for Extraordinary Services, and (4) for Final Distribution

DOD: 12-21-12	ROBERT SHAW, GAYDEN L. SCHORLING, and DOUGLAS D. SCHORLING , First Cousins of the Decedent and Co-Administrators with Limited IAEA without bond, are Petitioners.		NEEDS/PROBLEMS/COMMENTS: Continued from 11-12-14, 11-19-14. <u>Minute Order 11-12-14: The late-filed documents have not been reviewed by the examiner or the Court.</u> <u>Minute Order 11-19-14: The matter is continued to 1-7-15. Any and all objections or claims must be on file no later than 1-5-15, otherwise the Court will proceed on the underlying petition on that date. The Court orders a minute order be mailed to Laura Woodward. Continued to 1-7-15.</u> The following issue remains noted: <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>
	Accounting is waived		
	I&A: \$655,522.13		
	POH: \$515,024.24 plus a 1995 Monte Carlo		
	Co-Administrators (Statutory): \$16,110.44 (to be divided equally between two of the Co-Administrators Robert Shaw and Gayden L. Schorling)		
	Attorney (Statutory): \$16,110.44 (Note: Co-Administrator Douglas D. Schorling is the attorney for the three Co-Administrators.)		
	Attorney (Extraordinary): \$13,970.00 (Declaration filed 11-12-14 indicates 91.9 hours at \$150/hour for legal services including Petition to Determine Entitlement and Petition for Payment of Family Allowance, Unlawful Detainer, and Small Claims, and Court confirmed sale of real property totaling \$13,970.00)		
	Closing: \$10,000.00 (for anticipated expenses including estate income taxes and Decedent's personal income taxes)		
	Distribution pursuant to intestate succession:		
	Bobbi A. Schorling, Cheryl Reuben, Gayden L. Schorling, Robert Shaw, and Douglas D. Schorling: An undivided 20% interest in the estate, or \$103,004.84 less compensation and closing expenses.		
	Consent by Heirs to Distribution of Personal Property filed 11-18-14 states all heirs agree to distribution of the vehicle to Douglas Schorling for donation to AmVets National Service Foundation		
	Cont. from 111214, 111914		
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters	12-26-12	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		
			Reviewed by: skc Reviewed on: 12-19-14 Updates: Recommendation: File 2 – Marden

Page 2

NEEDS/PROBLEMS/COMMENTS (Continued):

1. **Petitioners request that the Co-Administrators' statutory compensation be split between two of the Co-Administrators, Robert Shaw and Gayden D. Schorling, and that Attorney Douglas D. Schorling, who is the third Co-Administrator, but is also the attorney for the Co-Administrators, receive the entire amount of statutory compensation as attorney. The Court may require clarification or authority for this request with reference to Cal. Rules of Court 7.706(a), which states:**

(a) Personal representative's compensation only

Notwithstanding the provisions of the decedent's will, a personal representative who is an attorney may receive the personal representative's compensation but may not receive compensation for legal services as the attorney for the personal representative unless the court approves the right to compensation for legal services in advance and finds the arrangement is to the advantage, benefit, and best interest of the decedent's estate.

Note: It does not appear that Mr. Schorling has requested approval in advance for compensation as an attorney pursuant to the above Rule of Court. As such, it appears that his statutory compensation may be limited to a one-third share of the Co-Administrators' statutory compensation, instead of the two other Co-Administrators splitting it half each.

Note: Petitioners request a closing reserve of \$10,000.00 due to anticipated potential additional taxes and expenses, and request to distribute the balance of the reserve without further Court order.

However, consistent with the Court's recent practice, if Court determines an informal accounting of the closing reserve is warranted, Court will set a Status Hearing as follows:

Wednesday, May 13, 2015 at 9:00 am in Dept. 303 for an Informal Accounting of the \$10,000.00 Closing Reserve.

Pursuant to Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required. The filing of the Informal Accounting of Closing Reserve will not generate a new hearing date.

(1) First Account and Report of Executor and (2) Petition for Preliminary Distribution; Status Report

DOD: 11/22/12	STEVEN D. HALL , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:																		
	Account period: 11/22/12 – 11/01/14																			
	Accounting - \$526,379.75																			
	Beginning POH - \$509,278.61																			
	Ending POH - \$214,571.16																			
Cont. from	<p>Petitioner states that the estate is not in a condition to be closed at this time and alleges that preliminary distributions may be made without loss to creditors or injury to the estate or anyone interested in it. After the proposed distributions, the property remaining in the estate is more than sufficient to pay the estimated unpaid liabilities, including attorney's fees, executor's fees and accounting fees.</p> <p>Petitioner states that he has made distributions without a court order and requests approval of these distributions:</p> <ul style="list-style-type: none"> - Decedent's clothing, household furniture and furnishings equally to his surviving 4 children; - \$6,000.00 each to his surviving 4 children; and - \$3,000.00 each to issue of predeceased child <p>Petitioner proposes further preliminary distributions as follows:</p> <table style="width: 100%;"> <tr> <td>Steven Hall</td> <td>-</td> <td>\$8,000.00</td> </tr> <tr> <td>Melinda Zavala</td> <td>-</td> <td>\$8,000.00</td> </tr> <tr> <td>Douglas Hall</td> <td>-</td> <td>\$8,000.00</td> </tr> <tr> <td>Jeffrey Ruebel</td> <td>-</td> <td>\$8,000.00</td> </tr> <tr> <td>Sarah Gameros</td> <td>-</td> <td>\$4,000.00</td> </tr> <tr> <td>Anne Hinojosa</td> <td>-</td> <td>\$4,000.00</td> </tr> </table> <p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> 1. Approving and allowing the first account; 2. Approving the prior preliminary distributions made by Petitioner; and 3. Approving the proposed additional preliminary distributions. 		Steven Hall	-	\$8,000.00	Melinda Zavala	-	\$8,000.00	Douglas Hall	-	\$8,000.00	Jeffrey Ruebel	-	\$8,000.00	Sarah Gameros	-	\$4,000.00	Anne Hinojosa	-	\$4,000.00
Steven Hall			-	\$8,000.00																
Melinda Zavala			-	\$8,000.00																
Douglas Hall			-	\$8,000.00																
Jeffrey Ruebel			-	\$8,000.00																
Sarah Gameros			-	\$4,000.00																
Anne Hinojosa			-	\$4,000.00																
<input type="checkbox"/> Aff.Sub.Wit.																				
<input checked="" type="checkbox"/> Verified																				
<input checked="" type="checkbox"/> Inventory																				
<input checked="" type="checkbox"/> PTC																				
<input checked="" type="checkbox"/> Not.Cred.																				
<input checked="" type="checkbox"/> Notice of Hrg																				
<input checked="" type="checkbox"/> Aff.Mail w/																				
<input type="checkbox"/> Aff.Pub.																				
<input type="checkbox"/> Sp.Ntc.																				
<input type="checkbox"/> Pers.Serv.																				
<input type="checkbox"/> Conf. Screen																				
<input type="checkbox"/> Letters 03/07/13																				
<input type="checkbox"/> Duties/Supp																				
<input type="checkbox"/> Objections																				
<input type="checkbox"/> Video Receipt																				
<input type="checkbox"/> CI Report																				
<input checked="" type="checkbox"/> 9202																				
<input checked="" type="checkbox"/> Order																				
<input type="checkbox"/> Aff. Posting																				
<input type="checkbox"/> Status Rpt																				
<input type="checkbox"/> UCCJEA																				
<input type="checkbox"/> Citation																				
<input checked="" type="checkbox"/> FTB Notice																				
		<p>Reviewed by: JF</p> <p>Reviewed on: 12/22/14</p> <p>Updates: 12/29/14</p> <p>Recommendation:</p> <p>File 3 - Hall</p>																		

4 Beverly Dois Cook (CONS/PE)

Case No. 13CEPR00966

Atty Rindlisbacher, Curtis D. (for Sheila Stearns – Daughter – Conservator – Petitioner)

Petition to Fix Residence Outside the State of California

		<p>SHEILA STEARNS, Daughter and Conservator of the Person and Estate, is Petitioner. (Petitioner is a resident of Prescott, AZ.)</p> <p>Petitioner requests that the Court authorize that the residence of the Conservatee be fixed outside the State of California to an address in Prescott Valley, AZ. (See petition for address and phone numbers).</p> <p>Petitioner states the Conservatee was removed from her residence on a W&I Code 5150. She had been living at her personal residence with her nephew, Phillip Cook, who was providing care for her. He informed Petitioner that he was no longer able to care for her because of her behavioral issues. When she was released after the 5150, Petitioner took her to Arizona temporarily so she would be able to watch over her. She has now placed her in a residential care facility.</p> <p>Petitioner was not able to get a hold of her former attorney (Sheldon Feigel) to discuss the change. After she retained Curtis Rindlisbacher, Petitioner was informed that she needed Court permission to move her mother to Arizona permanently.</p> <p>Petitioner states she has retained an attorney in Arizona to commence guardianship proceedings in Arizona. He is prepared to file those papers upon permission from this Court.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of service of Notice of Hearing on the Conservatee Beverly Dois Cook. Probate Code §§ 2352, 1460. 2. The Court may require notice to Phillip Cook, the nephew with whom the Conservatee was previously residing. 3. Need order. <p>Note: If granted, the Court will set a status hearing for the commencement of a conservatorship or equivalent proceeding in Arizona.</p> <p>Note: A status hearing for the filing of the additional receipts for blocked accounts was continued to 1-29-15.</p> <p>Note: A status hearing for the filing of the first account is set for 7-24-15. A prior status hearing for the filing of the Inventory and Appraisal was taken off calendar on 7-25-14; however, no I&A has been filed. If this petition is granted, the Court retains jurisdiction for the purposes of setting accounts pursuant to Probate Code §2630, and the Court may reset the above status hearings as applicable.</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters	8-25-14	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 12-22-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4 - Cook</p>	

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 11/25/2012	EUSTOLIA CAMACHO , surviving spouse, was appointed Administrator with full IAEA authority without bond on 04/28/2014.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 10/03/2014</p> <p>1. Need Inventory and Appraisal 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.</p>
Cont. from 100314	Letters issued on 04/29/2014	
Aff.Sub.Wit.	<p>Minute Order of 04/29/2014 set this matter for hearing for the filing of the Inventory and Appraisal.</p>	
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		
		Reviewed by: LV
		Reviewed on: 12/19/2014
		Updates:
		Recommendation:
		File 5 - Camacho

Petitioner states Conservatorship of the estate is necessary because the Conservatee is incapable of understanding or managing her own finances and property. Although a 70" TV was purchased using her funds, it is in her father's house, not hers. He also embezzled enough funds from her that he was sentenced to jail. Her funds are now protected through a guardianship and two trusts. Alameda County was guardian of the estate until that guardianship terminated when she became an adult. This matter was referred by that office once Ms. Moreno-Long attained the age of majority and required conservatorship. It is not necessary to file a petition for removal of the guardian of the estate because the guardianship already terminated by operation of law.

The Public Guardian also filed a Probate Conservatorship Investigation Report (Confidential).

Court Investigator Charlotte Bien filed a report on 12-19-14.

7 Melza J. Chaney (Estate)

Case No. 14CEPR00496

Atty Horswill, Joseph L. (for Lon Chaney – Administrator/Petitioner)

(1) First and Final Account and Report, (2) Petition for Statutory Administrator's Fees and Statutory Attorney Fees, (3) for Reimbursement of Funeral Expenses to Administrator, and (4) Final Distribution

DOD: 02/14/14	LON CHANEY , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 07/08/14 – 12/01/14	
	Accounting - \$244,553.69	
	Beginning POH - \$236,609.83	
	Ending POH - \$186,720.49 (all cash)	
Cont. from	Administrator (statutory) - \$7,732.20	
<input type="checkbox"/> Aff.Sub.Wit.	Administrator costs - \$820.08 (for funeral expenses)	
<input checked="" type="checkbox"/> Verified	Attorney (statutory) - \$7,732.20	
<input checked="" type="checkbox"/> Inventory	Costs - \$1,501.25 (filing fees, certified copies, publication, probate referee)	
<input checked="" type="checkbox"/> PTC	Distribution, pursuant to intestate succession, is to:	
<input checked="" type="checkbox"/> Not.Cred.	Lon Chaney - \$33,786.95	
<input checked="" type="checkbox"/> Notice of Hrg	Richard Chaney - \$33,786.95	
<input checked="" type="checkbox"/> Aff.Mail w/	Ruth Branch - \$33,786.95	
<input type="checkbox"/> Aff.Pub.	Ron Chaney - \$16,893.47	
<input type="checkbox"/> Sp.Ntc.	David Chaney - \$16,893.47	
<input type="checkbox"/> Pers.Serv.	Sandra Gray - \$11,262.32	
<input type="checkbox"/> Conf. Screen	Dennis Rowland - \$11,262.32	
<input type="checkbox"/> Letters 07/08/14	Julie Martin - \$11,262.32	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 12/22/14
		Updates: 12/29/14
		Recommendation: SUBMITTED
		File 7 - Chaney

Atty Teixeira, J. Stanley (for John J. Nelson, Executor)

Probate Status Hearing Re: Filing Inventory and Appraisal

DOD: 6/19/2014	JOHN J. NELSON , cousin, was appointed Executor with Full IAEA authority without bond on 9/17/2014.	NEEDS/PROBLEMS/COMMENTS: 1. Need complete <i>Final Inventory and Appraisal</i> pursuant to Probate Code § 8800(b).	
Cont. from	Letters issued on 9/18/2014.		
<input type="checkbox"/> Aff.Sub.Wit.	<p>Pursuant to Probate Code § 8800(b), <i>Final Inventory and Appraisal</i> was filed 12/10/2014; however, the document is defective in the following ways:</p> <ul style="list-style-type: none"> Item 1 and Item 2 are incomplete where the sums from Attachment 1, Attachment 2, and the grand total appraisal should be indicated; Item 5 is incomplete regarding the property tax certificate, as required by Probate Code § 8800(d) and Revenue and Tax Code § 480; Item 9 is incomplete where the assigned Probate Referee provides the statutory commission and verifies the appraisal; Attachment 2 contains no appraisal by the Probate Referee. 		
<input type="checkbox"/> Verified			
<input checked="" type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			
<input type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
		Reviewed by: LEG	
		Reviewed on: 12/22/14	
		Updates:	
		Recommendation:	
		File 8 - Davis	

DOD: 5/1/14		<p>JACK DARRYL JOHNSON, named executor without bond, is petitioner.</p> <p>Full IAEA – Not published for</p> <p>Will dated: 4/25/1996</p> <p>Residence: Fresno Publication: Fresno Business Journal</p> <p>Estimated value of the Estate:</p> <table> <tr> <td>Personal property -</td> <td>\$ 53,517.91</td> </tr> <tr> <td>Real property -</td> <td>\$140,000.00</td> </tr> <tr> <td>Total -</td> <td>\$193,517.91</td> </tr> </table> <p>Probate Referee: Steven Diebert</p>	Personal property -	\$ 53,517.91	Real property -	\$140,000.00	Total -	\$193,517.91	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Petition at item 2c requests full IAEA authority. However, the publication does not include the request to administer the estate under IAEA.</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, May 13, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Wednesday, February 10, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
Personal property -	\$ 53,517.91								
Real property -	\$140,000.00								
Total -	\$193,517.91								
Cont. from 111914									
<input checked="" type="checkbox"/>	Aff.Sub.Wit.								
<input checked="" type="checkbox"/>	Verified								
	Inventory								
	PTC								
	Not.Cred.								
	Notice of Hrg								
<input checked="" type="checkbox"/>	Aff.Mail W/								
<input checked="" type="checkbox"/>	Aff.Pub.								
	Sp.Ntc.								
	Pers.Serv.								
<input checked="" type="checkbox"/>	Conf. Screen								
<input checked="" type="checkbox"/>	Letters								
<input checked="" type="checkbox"/>	Duties/Supp								
	Objections								
	Video Receipt								
	CI Report								
	9202								
<input checked="" type="checkbox"/>	Order								
	Aff. Posting								
	Status Rpt								
	UCCJEA								
	Citation								
	FTB Notice								
		<p>Reviewed by: KT</p> <p>Reviewed on: 12/19/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10A - Johnson</p>							

Atty Aaron, Richard M.; Matlak, Steven M., of Dowling Aaron (for Petitioner William M. Rich)

Petition for Order Confirming Trust Assets

Rea DOD: 7/16/2014		<p>WILLIAM M. RICH, surviving Settlor and Trustee, is Petitioner.</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> Petitioner and REA T. RICH, as husband and wife, settled the RICH FAMILY TRUST dated 10/25/2007, as amended and restated on 6/13/2014 (<i>copy of amended trust attached as Exhibit A</i>); At the time of Rea's death on 7/16/2014, she held certain assets in her name only, not in the name of the Trust, which are the subject of this petition; the assets consist of bank accounts, investment accounts, and stocks; Petitioner believes Rea intended to transfer all of the assets into the Trust to be administered and distributed pursuant to the Trust; Trust terms provide that all property transferred to the Trust as of the 6/13/2014 amendment and restatement and the property thereafter assigned and transferred to the Trust, was to be held by the Trust estate and administered and distributed under the terms of the Trust; the Trust terms refer to property that <i>is intended to be transferred to and constitute a part of the Trust</i> (emphasis added) shall be held in trust as part of the Trust estate; The property in Schedule A includes bank accounts, savings and loan accounts, brokerage house account, certificates of deposit, mutual funds and all other investment accounts or investment vehicles; stocks, bonds and other securities; all property belonging to William M. Rich [Petitioner] and/or Rea T. Rich not otherwise described in <i>[the Trust]</i>; <p align="center">~Please see additional page~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proposed order pursuant to Local Rule 7.1.1(F) providing that a proposed order shall be submitted with all pleadings that request relief.</p>	
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			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			X
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: LEG
				Reviewed on: 12/22/14
				Updates:
		Recommendation:		
		File 11 - Rich		

Petitioner states, continued:

- Taken together, the Trust and Schedule A show that Rea intended for all her property, including the assets, to be assigned to the Trust and held for the benefit of its beneficiaries, even if such property was not titled in the name of the Trust;
- The Settlers also executed that certain Assignment dated 10/25/2007, which transferred and assigned all of the Settlers' right, title and interest in all the real and personal property described in *Exhibit A* of the Assignment to the Trust (*copy of Assignment attached as Exhibit C*);
- Property in *Exhibit A* of the Assignment includes bank accounts, savings and loan accounts, brokerage house account, certificates of deposit, mutual funds and all other investment accounts or investment vehicles; stocks, bonds and other securities; all property belonging to William M. Rich [*Petitioner*] and/or Rea T. Rich not otherwise described in the Assignment;
- Therefore, the Assignment also shows that Rea intended to transfer and assign all of the assets, among other items, to the Trust;
- Notwithstanding Rea's intent that all the assets be subject to the Trust, through inadvertence, the following assets owned by Rea were never formally transferred [*listed in lines 23 – 28 on page 3, lines 1 – 28 on page 4, and lines 1 – 18 on page 5*];
- Petitioner seeks to bring Rea's intention to fruition and requests that this Court confirm that the assets are part of the Trust and subject to the control of Petitioner as successor trustee of the Trust;
- Petitioner notes that Rea's will is a pour-over will that bequeaths any and all estate property to the Trust to be held, administered and distributed pursuant to its terms (*copy of Rea's will attached as Exhibit D*); therefore, even if the assets were probated, they would end up as part of the Trust estate and ultimately pass to the Trust beneficiaries;
- Petitioner is not aware of any party who would allege that the assets should be included in Rea's estate and not treated as a Trust asset;
- Petitioner requests this Court confirm and declare that the assets are a Trust asset, held by Petitioner as Trustee of the Trust.

Petitioner prays for an Order that the bank accounts, investment accounts, and stocks identified in the Petition are subject to the management and control of Petitioner, the successor trustee of the Trust, and Petitioner's interest in such bank accounts, investment accounts, and stock shall be and is confirmed and transferred to the Trust.

Atty Teixeira, J. Stanley (for Petitioner Laura Kuhne-Irigoyen)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 9/10/2014	LAURA KUHNE-IRIGOYEN , spouse, is Petitioner and requests appointment as Administrator without bond with bond set at \$245,000.00 .	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Monday, February 9, 2015 at 9:00 a.m. in Dept. 303 for filing proof of bond; • Monday, June 8, 2015 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and • Monday, March 7, 2016 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. <p>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.</p>
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA — OK	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	Decedent died intestate.	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Residence — Fresno Publication — Business Journal	
<input checked="" type="checkbox"/> Aff.Mail	W/O	
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp	Probate Referee: Rick Smith	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LEG
		Reviewed on: 12/22/14
		Updates:
		Recommendation: SUBMITTED
		File 12 - Irigoyen

DOD: 6-12-07	KIM MARIE GALLO, Daughter-in-law, was appointed Administrator with Will Annexed with Full IAEA without bond on 9-11-13 and Letters issued on 9-13-13.	NEEDS/PROBLEMS/COMMENTS:
Cont from 111414	At the hearing on 9-11-13, the Court set this status hearing for the filing of the first account or petition for final distribution.	<p>Minute Order 11-14-14: Ms. Amador represents that Kim Marie Gallo has moved to Wisconsin, but that she will continue to attempt to make contact with her. If the First Account of Petition for Final Distribution is filed by 01/05/15, then no appearance is necessary on 01/07/15. However, should the accounting or petition not be filed by the due date, Ms. Gallo is ordered to be personally present on 01/07/15. Cont. to 010715.</p> <ol style="list-style-type: none"> 1. Need first account or petition for final distribution pursuant to Probate Code §12200 or verified written status report pursuant to Local Rule 7.5. 2. The Court may require bond, since the Administrator has moved out of state since her appointment. 3. Need Notice of Change of Address filed with proof of service on interested persons as appropriate. <p>Note: The decedent's will devises her estate to her son, John Eugene Gallo, who died in 2012. Therefore, it appears his estate would be the heir to this estate.</p>
Aff.Sub.Wit.		
Verified	I&A filed 10-4-13 indicates real property valued at \$175,000 as of the decedent's date of death (6-12-07).	
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		
		Reviewed by: skc
		Reviewed on: 12-19-14
		Updates:
		Recommendation:
		File 14 – Sidam

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 10-20-13	<p>AIMEE HOLLAND, Granddaughter, was appointed as Executor with Full IAEA without bond on 7-31-14. Letters issued on 8-5-14.</p> <p>At the hearing on 8-5-14, the Court set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal pursuant to Probate Code §8800 or verified written status report pursuant to Local Rule 7.5.</p>
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		
		Reviewed by: skc
		Reviewed on: 12-22-14
		Updates:
		Recommendation:
		File 15 - Morgan

Status Hearing Re: Filing of the Bond and Receipt for the Blocked Account

DOD: 3-25-14	<p>LANAE AREYANO, Daughter, was appointed Administrator with Limited IAEA with bond of \$13,500.00 and deposits of \$1,663.00 to be placed into a blocked account on 10-7-14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Receipt filed 11-17-14, Declaration filed 12-18-14.</p>
Cont. from 111214, 111914		
Aff.Sub.Wit.	At the hearing on 10-7-14, the Court signed the Order for Probate and the Order to Deposit Money Into Blocked Account and set this status hearing for the filing of the bond and receipt for blocked account.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Bond was filed on 10-30-14 and Letters issued on 11-4-14.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Inventory and Appraisal filed 11-4-14 includes real property valued at \$145,000.00, a vehicle valued at \$9,500.00, and misc. furniture and personal effects valued at \$5,000.00, for a total of \$159,000.00.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 12-19-14
		Updates:
		Recommendation:
		File 16 – Areyano

		KIMBERLY RODRIGUEZ , Mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on all relatives per Probate Code §1460(b)(5), including: - Ray Rodriguez (Father) - Enrique Rodriguez (Paternal Grandfather) - Tracy George (Maternal Grandfather)
		RHONDA GEORGE , Maternal Grandmother, was appointed Guardian on 6-14-12. - Consents to termination and waives notice	
	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		
Father: RAY RODRIGUEZ Paternal Grandfather: Enrique Rodriguez Paternal Grandmother: Minerva Atkisson (deceased) Maternal Grandfather: Tracy George			
The petition is incomplete and is blank at #5 (reason for termination). Guardian Rhonda George signed the Consent to Termination and Waiver of Service and Notice of Hearing on 10-7-14.			
Court Investigator Julie Negrete filed a report on 12-12-14.			
Reviewed by: skc			
Reviewed on: 12-22-14			
Updates:			
Recommendation:			
File 18 – George-Rodriguez			

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u></p> <p>Final Inventory & Appraisal</p> <p>filed 12/15/14</p>
DOD:		
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		
		Reviewed by: JF
		Reviewed on: 12/22/14
		Updates:
		Recommendation:
		File 20 - Connelly

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 03/31/14	<p>ROSIE H. ACOSTA, mother, was appointed Administrator with Full IAEA and without bond on 07/23/14. Letters were issued on 07/25/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory & Appraisal.</p>
	<p>Minute Order from hearing on 07/23/14 set a status hearing for filing of the Inventory & Appraisal on 01/07/15.</p>	
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		
		Reviewed by: JF
		Reviewed on: 12/22/14
		Updates:
		Recommendation:
		File 21 - Acosta

**22A Tiffany April Kelly Adams and
Trinity Nicole Thornton (GUARD/P)**

Case No. 14CEPR00985

Atty Pottorff, Sean (Pro Per – Nonrelative – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		TEMP EXPIRES 1-7-15	<p>SEAN POTTORFF, Nonrelative, is Petitioner.</p> <p>Mother: DENIA ADAMS</p> <p>Father: UNKNOWN - <i>Notice dispensed pursuant to Minute Order 11-20-14</i></p> <p>Paternal Grandfather: Unknown Paternal Grandmother: Unknown</p> <p>Maternal Grandfather: Daniel C. Adams Maternal Grandmother: Patricia L. Adams</p> <p>Sibling: Trinity Thornton</p> <p>Petitioner states the mother is incarcerated and a safety plan was placed for the minor to be with Petitioner. Petitioner provided a copy of a DSS Team Decision-Making Summary Report (TDM) dated 10-23-14, pursuant to which the minor was released to Petitioner's custody.</p> <p>Court Investigator Jennifer Young filed a report on 12-23-14.</p> <p>A DSS Report pursuant to Probate Code §1513(a) will also be filed.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: This petition pertains to the minor Tiffany only. Page B is a competing petition for guardianship of both minors Tiffany and Trinity. The parties attended mediation on 11-20-14 and agreed to a visitation plan, which was adopted as the order of the Court. Further mediation was scheduled for 12-23-14.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing on Denia Adams (Mother) per Probate Code §1511 or consent and waiver of notice or declaration of due diligence. 3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing on the maternal grandparents, Daniel C. Adams and Patricia L. Adams, per Probate Code §1511. 4. If notice to paternal grandparents is not dispensed, need service per Probate Code §1511.
	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			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 12-23-14	
			Updates:	
			Recommendation:	
			File 22A - Adams	

22A

**22B Tiffany April Kelly Adams and
Trinity Nicole Thornton (GUARD/P)**

Case No. 14CEPR00985

Atty Adams, Patricia (Pro Per – Maternal Grandmother – Petitioner)

Atty Adams, Daniel (Pro Per – Maternal Grandfather – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		TEMP DENIED 11-20-14	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> The parties attended mediation on 11-20-14 and agreed to a visitation plan, which was adopted as the order of the Court. Further mediation was scheduled for 12-23-14.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Sean Pottorff (Temporary Guardian of Tiffany) - Denia Adams (Mother) - Martin Thornton (Father of Trinity) <u>Note:</u> Sean Pottorff and Denia Adams were served regarding the temporary hearing date, but not this general hearing date. However, it does not appear that Martin Thornton, Trinity's father, has been served at all. 3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on paternal grandparents of both minors.
		TEMP (TIFFANY ONLY) GRANTED TO SEAN POTTORFF ON 11-10-14	
		PATRICIA ADAMS and DANIEL ADAMS, Maternal Grandparents, are Petitioners.	
	Aff.Sub.Wit.	Father (Tiffany): UNKNOWN	
✓	Verified	Father (Trinity): MARTIN W. THORNTON	
	Inventory	Paternal Grandfather (Tiffany): Unknown	
	PTC	Paternal Grandmother (Tiffany): Unknown	
	Not.Cred.	Paternal Grandfather (Trinity): Unknown	
	Notice of Hrg	Paternal Grandmother (Trinity): Unknown	
	Aff.Mail	Petitioners state the mother has been incarcerated and is now going through court and custody issues. Petitioners want to take care of the children until she gets help and back on her feet. Trinity's father is not working and is struggling also. Tiffany's biological father is unknown.	
	Aff.Pub.	Court Investigator Jennifer Young filed a report on 12-23-14.	
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 12-23-14
			Updates:
			Recommendation:
			File 22B - Adams

22B

23 Valentin Aguirre, Adrian Aguirre & Delaina Aguirre (GUARD/P)

Case No. 14CEPR00986

Atty Aguirre, Micaela (pro per – paternal great-aunt/Petitioner)

Atty Garcia, Lena (pro per – mother/Objector)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Valentin, 5	<u>NO TEMPORARY REQUESTED</u>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Petitioner is Spanish speaking.</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of service of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> at least 15 days before the hearing <u>or</u> <i>Consent & Waiver of Notice or Declaration of Due Diligence</i> for: <ol style="list-style-type: none"> a. Valentin Aguirre (father) – personal service required b. Lena Garcia (mother) – personal service required c. Paternal grandparents – service by mail sufficient d. Maternal grandparents - service by mail sufficient e. Jonathan Franco (brother) – service by mail sufficient
Adrian, 4	MICAELA AGUIRRE, paternal great-aunt, is Petitioner.		
Delaina, 1	Father: VALENTIN AGUIRRE		
	Mother: LENA GARCIA		
Cont. from	Paternal grandparents: NOT LISTED		
<input type="checkbox"/> Aff.Sub.Wit.	Maternal grandparents: NOT LISTED		
<input checked="" type="checkbox"/> Verified	Siblings: JONATHAN FRANCO (17), EVANGELINA SERNA (8), SERENITY SERNA (7)		
<input type="checkbox"/> Inventory	Petitioner states that guardianship is needed because the mother has left the children in her care and stated that she is unable to provide for them.		
<input type="checkbox"/> PTC	Objection to Guardianship filed 11/26/14 by mother, Lena Garcia, states that she only meant for petitioner to have the children temporarily and that she can care for them.		
<input type="checkbox"/> Not.Cred.	Court Investigator Jennifer Young filed a report on 12/18/14.		
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input checked="" type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: JF
			Reviewed on: 12/23/14
			Updates:
			Recommendation:
			File 23 - Aguirre

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 11-14-02	ARTHUR DE ARMOND , Son, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner requests that the property pass to him as executor; however, this is a summary proceeding and no executor will be appointed. For use of this summary proceeding under Probate Code §13152, a verified petition may be brought by <u>all</u> successors in interest, and the property would then pass directly to the heirs without probate administration. Therefore, need amended petition verified by all four heirs.
	40 days since DOD	
	No other proceedings	
<input type="checkbox"/> Aff.Sub.Wit.	I&A: \$80,000.00 (residential real property in Fresno)	
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Will dated 10-25-95 devises the property as follows: To Beatrice Parker, friend, a life estate, and upon her death, to Grace De Armond, spouse, if living, and if not living, to the decedent's four children: Marie Coldren, Arthur De Armond, Donnie De Armond, and Barbara Clem.	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Petitioner states Grace De Armond died 4-7-12 and Beatrice Parker died 10-18-14.	
<input type="checkbox"/> Conf. Screen	Petitioner requests Court determination that the real property passes to him as executor.	
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 12-23-14
		Updates:
		Recommendation:
		File 24 - DeArmond

25 **Teresa Jacquez (CONS/P)**
 Atty Jacquez, Teresa (pro per – daughter/Petitioner)
 Atty Janisse, Ryan Michael (court appointed for proposed conservatee)

Case No. 14CEPR01059

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

Age: 89	<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 12/04/14. Voting rights affected, need minute order. 1. Need Citation and proof of personal service of Citation with a copy of the <i>Petition for Appointment of Probate Conservator</i> on the proposed conservatee. 2. Need receipt for viewing conservatorship video.
	TERESA JACQUEZ , daughter, is Petitioner and requests appointment as Conservator of the Person with medical consent and dementia powers to administer dementia medications and for placement in a secured perimeter facility.		
	Voting rights affected.		
	Petitioner states that the proposed conservatee is unable to made decisions or care for herself. She requires assistance and uses a walker to ambulate.		
	Court Investigator Dina Calvillo filed a report on 12/18/14.		
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.	x		
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt	x		
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation	x		
<input type="checkbox"/> FTB Notice			
Reviewed by: JF			
Reviewed on: 12/23/14			
Updates:			
Recommendation:			
File 25 - Jacquez			

Petition for Appointment of Guardian of the Estate (Prob. C. 1510)

		NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		TWIONESHIA NACOLE MILES, Mother, is Petitioner and requests appointment as Guardian of the Estate with bond (amount unspecified).	1. Need Notice of Hearing.
		Father: BRIAN EDWARD DUPREE (Deceased)	2. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 or consent and waiver of notice on Maternal Grandmother Carmelita Miles.
<input type="checkbox"/>	Aff.Sub.Wit.	Paternal Grandparents: Deceased	3. The Court may require clarification regarding the need for powers under Probate Code §2590. Pursuant to Local Rule 7.15.12, it is the policy of the court to grant only those independent powers necessary in each case to administer the estate.
<input checked="" type="checkbox"/>	Verified	Maternal Grandfather: Not listed	4. Pursuant to Local Rule 7.8.1.1, it is the policy of the Court to block all funds in guardianship estates. Therefore, Examiner has prepared Order to Deposit Money Into Blocked Account.
<input type="checkbox"/>	Inventory	Maternal Grandmother: Carmelita Miles	5. If required, bond should be at least \$22,000.00 pursuant to Probate Code §2620(c) and Cal. Rule of Court 7.207.
<input type="checkbox"/>	PTC	Estimated Value of Estate: Personal property: \$20,000.00	6. Need clarification regarding Petitioner's residence address: Captions indicate an address on San Bruno; however, UCCJEA indicates an address on Dakota. (Note: The orders are prepared with the San Bruno address since that is the address used in the captions.)
<input type="checkbox"/>	Not.Cred.	Petitioner states the deceased parent provided provision for the child in the form of insurance payable upon death. As per insurance agency policy, a guardian of the minor's estate must be appointed prior to the release of the insurance payment.	Note: If granted, the Court will set status hearings as follows:
<input type="checkbox"/>	Notice of Hrg		- Wednesday, June 10, 2015 for filing the Inventory and Appraisal (GC-040)
<input type="checkbox"/>	Aff.Mail		- Wednesday, March 11, 2015 for filing the Receipt for Blocked Account (MC-356)
<input type="checkbox"/>	Aff.Pub.		- Wednesday, June 8, 2016 for filing the First Account.
<input type="checkbox"/>	Sp.Ntc.		If the proper items are on file prior to the scheduled status dates, the status hearings may be taken off calendar.
<input type="checkbox"/>	Pers.Serv.		Please also see Local Rule 7.8.2 regarding accountings in guardianship estates.
<input checked="" type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order	Petitioner also requests powers under Probate Code §2590.	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 12-23-14
			Updates:
			Recommendation:
			File 26 - Dupree

Age: 49		<p><u>TEMPORARY GRANTED EX PARTE:</u> <u>EXPIRES 01/07/15</u></p> <p><u>GENERAL HEARING: 01/29/15</u></p> <p>PUBLIC GUARDIAN, is Petitioner and requests appointment as Temporary Conservator of the Person.</p> <p>Petitioner states that Mr. Griffin is currently living in a board and care home. Prior to moving to a care home, he was living with his sister in deplorable conditions. Since moving to the care home he has improved significantly. Petitioner states that Mr. Griffin's sister, Shellie Griffin, has tried removing him from the care home and became verbally and physically assaultive when she was told she could not take him. Petitioner states that Mr. Griffin is easily persuaded and easily manipulated. He is a client of CVRC and developmentally disabled.</p> <p>Court Investigator Jennifer Young filed a report on 12/22/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 12/17/14.</p> <ol style="list-style-type: none"> 1. Need proof of personal service of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Conservatorship</i> at least 5 days before the hearing for: <ol style="list-style-type: none"> a. Edward Griffin (proposed conservatee) 2. Temporary was granted Ex Parte, if temporary is extended, need new Letters of Conservatorship. 	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			x
<input type="checkbox"/>	Conf. Screen			n/a
<input type="checkbox"/>	Letters			x
<input type="checkbox"/>	Duties/Supp			n/a
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			x
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: JF</p> <p>Reviewed on: 12/23/14</p> <p>Updates: 12/29/14</p> <p>Recommendation:</p> <p>File 28 – Griffin</p>		