



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.

2 Leonardo Castro & Sofia Castro (GUARD/P)

Petitioner Marcos, Isidro (Pro Per – Father of Sofia Castro)

Petition for Visitation

Sofia Age: 8		ISIDRO MARCOS, father, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
		MARIA CASTRO VARGAS, maternal grandmother, was appointed guardian on 10/05/2009. Personally served on 11/10/2015.	Note: Petition pertains to Sofia Castro only.	
Cont. from		<p><u>Please see petition for details</u></p>	<p>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 Visitation for:</p> <ul style="list-style-type: none"> • Maribel Marcos Castro (Mother) 	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
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<input checked="" type="checkbox"/>	Notice of Hrg			
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<input type="checkbox"/>	Duties/Supp			
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<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: LV	
			Reviewed on: 01/04/2016	
			Updates:	
			Recommendation:	
			File 2- Castro	

Petitioner White, Samuel (Pro Per – Father)

Petition for Visitation

Samantha Age: 12	SAMUEL WHITE, father, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Visitation for: <ul style="list-style-type: none"> • Susan L. Ortega (Guardian) • Nicole S. Saenz (Mother)
Samuel Age: 11	SUSAN L. ORTEGA, maternal grandmother, was appointed guardian on 02/25/2010.	
Seith Age: 9		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	<u>Please see petition for details</u>	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	x	
<input type="checkbox"/> Aff.Mail	x	
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<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: 01/04/2016
		Reviewed on:
		Updates:
		Recommendation:
		File 3- Saenz & White

Petitioner

Hill, Andrew (pro per – father)

Petition for Termination of Guardianship

Age: 7	ANDREW HILL, father, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 12/10/15</u> Minute order from 12/10/15 states: Mr. Hill represents that he over knighted paperwork on Sunday addressing the defects, however, said documents are not yet entered. The court indicates that it is prepared to grant the petition upon receipt of the proper proof of service.</p> <p>As of 12/30/15, nothing further has been filed.</p> <p>1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: a. Francis Gilbo (paternal grandfather)</p>
	DONAVAN MORRISON and PRISCILLA MORRISON , maternal grandparents, were appointed as Co-Guardians on 07/12/11. – <i>Consent of both guardians filed 05/21/15.</i>	
Cont. from 072115, 090115, 100815, 110515, 121015	Mother: STEPHANIE MORRISON – personally served on 09/22/15	
Aff.Sub.Wit.		
✓ Verified		
Inventory	Paternal grandfather: FRANCIS GILBO	
PTC	Paternal grandmother: HALLIDIE HILL – personally served on 09/17/15	
Not.Cred.		
✓ Notice of Hrg	Petitioner states [see file].	
Aff.Mail	x Court Investigator Jennifer Young filed a report on 07/14/15.	
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		
		Reviewed by: JF
		Reviewed on: 12/30/15
		Updates:
		Recommendation:
		File 4 – Morrison

Attorney: Linda K. Durost (for Petitioner/Administrator Toni Richardson)

Attorney: Gary Winter (for Objector, Bill Richardson)

Amended First and Final Report and Account of Administrator; for Allowance of Statutory Attorneys' Fees and Costs; Allowance of Statutory Administrator's Fees and for Final Distribution

DOD: 6/2/11	TONI RICHARDSON , Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Need Amended Accounting based on but not limited to the following:</p> <ol style="list-style-type: none"> Inventories and appraisals filed total \$182,550.00 and not \$177,550.00 as stated in the accounting. (Reappraisal for sale is just for the sale of the real property. The inventory and appraisal with the date of death value is the correct inventory to use for account purposes.) Statutory fees are calculated incorrectly. Attorney incorrectly included the mortgage payoff as a loss on sale. The correct statutory fees should be \$6,339.79. Calculated on the fee base as follows: I & A - \$182,550.00 Receipts - \$ 543.03 Gains on sale - \$ 400.00 Less loss on sale of real property- <u>\$ 5,500.00</u> Total fee base - \$177,993.03 <p>Please see additional page</p>
	Account period 2/22/12 – 2/2015	
Cont. from 072215, 090915, 100715	Accounting - \$178,548.26	
	Beginning POH - \$177,550.00	
Aff.Sub.Wit.	Ending POH - \$106,186.69	
<input checked="" type="checkbox"/> Verified	Attorney - \$4,562.00	
<input checked="" type="checkbox"/> Inventory	Administrator - \$4,562.00	
<input checked="" type="checkbox"/> PTC	Attorney costs (filing fee) - \$435.00	
<input checked="" type="checkbox"/> Not.Cred.	Reimbursement of costs to Administrator - \$20,488.00	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.	Distribution, pursuant to intestate succession, is to:	
Pers.Serv.	Toni Richardson - \$36,794.14	
Conf. Screen	Bill Richardson - \$36,794.14	
<input checked="" type="checkbox"/> Letters 2/22/12		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 1/4/16
		Updates:
		Recommendation:
		File 5 - Bonham

3. Need Allowance or Rejection of Creditor's Claim for the Creditor's Claim of DMC filed on 4/27/12. California Rules of Court, Rule 7.401 states that for each creditor's claim filed the Administrator must (1) Allow or reject the claim (2) serve a copy of the claim on the creditor (3) file a copy with proof of service with the court.
4. Escrow closing statement shows that the Administrator received \$110,594.07 from the sale of the real property. The proceeds were ordered into a blocked account. Receipt for Blocked account shows a deposit of \$105,594.07. A difference of \$5,000. Petitioner states when the sale proceeds were deposited, prior to it being blocked, the bank automatically withdrew \$2,300 to pay the balance of the Decedent's credit card. Petitioner states she paid Sam LaPlaca \$1,000 for roofing work he had done on the residence and another \$1,700.00 for other repairs. Examiner note: The declaration of Petitioner for reimbursement of costs also include a \$1,000 payment to Sam LaPlaca Construction for roofing repairs. Is the \$1,000 that petition is asking to be reimbursed in addition to the \$1,000 paid from the proceeds of the real property sale? Court may require receipts for the repairs done from Sam LaPlaca Construction.
5. Warren Felger was the former attorney in this case. Therefore he is entitled to a portion of the statutory attorney fees. Need agreement from the attorneys as to apportionment of the attorney fees. – Attorney Durost states that attempts to discuss the fees with Mr. Felger have gone unanswered. Mr. Felger made numerous errors and failed to communicate with petitioner and advise petitioner properly with respect to the account management. Attorney Durost requests that no part of the statutory fees be attributable to Mr. Felger. – *Declaration of Attorney filed on 7/22/15 states the only response to she received from Mr. Felger was a large hourly billing statement from him at \$340 her pour for a total of \$13,158.00 in fees and \$1,565.68 in costs.*
6. Creditor's claim of Toni Richardson includes an entry on 3/10/13 for \$500 to Warren Felger for filing fees. Petitioner states she paid Mr. Felger \$500 for filing fees that apparently he never paid.
7. Petitioner states she distributed \$5,000 and jewelry valued at \$250.00 to her brother Bill Richardson. Need receipts for preliminary distribution.

Please see additional page

Objections of Bill Richardson filed on 7/21/15 alleges the inventory and appraisal filed on 2/10/15 is incorrect in that it failed to disclose the proceeds of the trailer that was sold prior to decedent's death with the proceeds received after the decedent's death. Petitioner also alleges that the proceeds of the trailer - \$5,000 – was given directly to objector. However, Objector contends that the trail was not property of the Decedent, but actually belonged to Frances L. Foster, Decedent's long time live-in boyfriend, who died shortly before the Decedent. Therefore, since the trailer was not the Decedent's property it should not have been included in Petitioner's Second Corrected Inventory and Appraisal and therefore the total value of the Second Inventory and Appraisal (\$7,550) should be reduced by \$5,000.

Petitioner alleges to have distributed ½ of Decedent's jewelry, appraised at \$500 total, to Objector. However, Objector contends to have never received any jewelry. Therefore should not be credited with an advance distribution of Decedent's jewelry. Because Objector received no advance distribution from Decedent's estate, Objector contends that not only is Petitioner not entitled to any equalizing distribution, but that Objector should receive an equalizing advance distribution of \$2,950, in light of Petitioner's advance distributions to herself (vehicle valued at \$1,550; jewelry valued at \$500; and \$900 from the sale of Decedent's personal property).

Probate Examiner Notes dated 5/5/15 identify the fact that the Court ordered proceeds from the sale of the Decedent's home into a blocked account, that Petitioner received \$110,594.07 from the property, and deposited only \$105,594.07. In explaining the whereabouts of the missing \$5,000, Petitioner indicates in her Amended Report that (1) EECU deducted \$2,300 for payment in full on Decedent's EECU credit card balance; and (2) she paid Sam Laplaca \$1,000 out of the funds to repair the property's roof, and \$1,700 for other repairs and cleanup on the house. However, Objector contests these claims.

Objector asserts that the Decedent did not owe any balance on an EECU credit card at the time of her death. Additionally, Objector knows Sam Laplaca personally, he is Petitioner's son and Objector's nephew. Objector claims Mr. Laplaca is not a California licensed contractor, and if he performed the services Petitioner claims to have paid him for, he would be in violation of Assembly Bill 2237, which requires anyone working on a construction project worth \$500 or more to be a licensed contractor. Moreover, Petitioner is in violation of Probate Code §1064(a)(4) by not disclosing the familial relationship with Mr. Laplaca in the Amended Report.

Barring satisfactory evidence as to Petitioner's claims regarding the expenditure of the missing \$5,000, Objector requests the amount be charged against the Petitioner's compensation as Administrator, with any remaining charge credited against Petitioner's final distributive share in favor of Objector.

Petitioner seeks \$20,488 in reimbursable administrative costs. Objector specifically contests each and every expense Petitioner has submitted for reimbursement. Objector requests satisfactory evidence to support the correctness of each charge listed in the schedule (explained in greater detail in the objections).

Please see additional page

Objections of Bill Richardson filed on 7/21/15 (Cont.):

Wherefore, Objector prays for an order:

1. Petitioner/Administrator's Second Corrected Inventory and Appraisal be reduced by \$5,000 to reflect the fact that the itemized trailer was not estate property and Objector never received any sale proceeds.
2. Objector be entitled to an equalizing preliminary distribution of \$2,950 to offset the advanced distributions Petitioner/Administrator made to herself.
3. Petitioner produce satisfactory evidence to support her claims regarding the \$5,000 missing from the sale of Decedent's house within 30 days of this Order, or otherwise have that amount charged against her fiduciary compensation and final distributive share if necessary.
4. Petitioner produce satisfactory evidence to support the correctness and legitimacy of each and every charge listed for her reimbursement schedule within 60 days of this Order, or otherwise have any and all unsupported charges disallowed.
5. Costs and attorneys' fees as allowable by law and according to proof.

6 Francesco Di Donna (Estate) Case No. 14CEPR00080

Attorney Fanucchi, Edward L. (for Pat DeSantis – Administrator)

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

DOD: 07/24/11	PAT DESANTIS , friend, was appointed Administrator with Limited IAEA and without bond on 06/06/14. Letters of Administration were issued on 06/20/14.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 09/24/15</u> Minute Order from 09/24/15 states: Counsel represents that the property was listed in early July; requests 90 days. If the petition is filed at least two court days prior, then no appearance is necessary on 01/07/16. If the petition is not filed then a status report, verified by the client, is due no later than two court days prior to 01/07/16.</p> <p>1. Need First Account and/or Petition for Final Distribution.</p>
Cont. from 050115, 061115, 092415	Inventory & Appraisal, Amended final, filed 11/06/14- \$350,000.00	
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Status Report filed 12/14/15 states: The estate tax return was filed 08/31/15 without payment so that penalties for late filing of the return would cease. The amount needed to pay the taxes, along with penalties, \$81,812.00, was received via wire transfer by the law office of Quinlan, Kershaw and Fanucchi on 12/07/15 and the money was deposited with the IRS on that date. The accounting firm of Slater Moffat Associates, LLP who prepared the return states that the IRS will place a 6 week hold on the funds while the IRS considers the possibility of an abatement of the late penalties accrued. Petitioner has not been released from personal liability for the federal estate tax under IRC § 2204. The return has not been audited and a closing letter has not been issued by the IRS. The two heirs at law are the surviving daughters of the decedent who are non-resident, non-citizen beneficiaries. The executor is currently talking with the CPA to discuss the manner of distribution to the heirs and what tax consequences will be imposed under different methods of distribution, and has begun the process of applying for social security numbers for the beneficiaries. A 90 day continuance is requested to allow for tax issues to be resolved, for petitioner to be released by the IRS, and for the application of the heirs for social security numbers.	
<input checked="" type="checkbox"/> Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
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Duties/Supp		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 12/30/15
		Updates:
		Recommendation:
		File 6 – Di Donna

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

DOD: 12/20/13	JOANN DIREDO was appointed Executor with Full IAEA without bond on 7/10/14.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution.</p>
	At the hearing on 7/10/14, the Court set this status hearing re the filing of the first account or petition for final distribution.	
	Note: Final I&A filed 5/29/15 reflects a total estate value of \$2,550,000 consisting of various real property interests.	
Cont'd from 091015	Status report filed 9/9/15 states in response to a rejected creditor's claim, David Allen DiRedo filed a Complaint for Breach of Contract Money Had and Received Declaratory Relief on 3/30/15 against the estate. The case is currently in litigation. (Note: See claim filed 8/19/14 for \$106,846.46) In addition, escrow has just been opened on the real property located on West Shaw. Therefore, the estate is not in a condition to be closed. Attorney Fanucchi requests continuation for at least four months to complete the sale and continue with the litigation pending against the estate.	
Aff.Sub.Wit.	Status Report filed 12/8/15 states the complaint filed by David Allen DiRedo in 15CECG01036 is currently in the process of litigation. Regarding the property: Escrow was scheduled to close on 11/30/15; however, due to unforeseen circumstances, escrow was put on hold and the sale is now in jeopardy. The property was taken off the market back in September when the offer was originally accepted and therefore, due to failure of the escrow to close, a new listing and re-marketing has begun.	
Verified	Currently the estate is not in a condition to be closed due to the pending lawsuit and the pending sale of the real property. Therefore, it is requested that this status hearing be continued for no less than 4 months to complete the sale and continue the litigation.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
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Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 12/29/15
		Updates:
		Recommendation:
		File 7- DiRedo

DOD: 12/12/74	DOLRES MEDINA , Daughter, was appointed Administrator with Limited IAEA without bond on 10/30/14 and Letters issued 10/31/14.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution per Probate Code §12200.</p>
Cont'd from 102915	At the hearing on 10/30/14, the Court set this status hearing for the filing of the first account or petition for final distribution.	
Aff.Sub.Wit.		
Verified		
Inventory		
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Not.Cred.		
Notice of Hrg		
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Citation		
FTB Notice		
	<p>Status Report filed 10/27/15 states the sole asset of the estate is real property located at 35 E. San Joaquin St., in Fresno that was in very poor condition. After notification of administrative citations from the City of Fresno, the structure on the property was removed.</p> <p>An I&A of the property filed 11/17/14 reflects a value at the date of death (in 1974) of \$12,000.00. The Reappraisal for Sale filed 1/20/15 reflects the property value of \$50,000.00.</p> <p>The property was listed for sale at \$50,000.00 on 6/6/15. The value has since been reduced once to \$42,500.00 and again to \$34,500.00.</p> <p>The estate is required to sell the property to pay a creditor's claim to the Fresno County Tax Collector and administrative costs. A continuance of 60 days is requested.</p> <p>Status Report filed 1/4/16 states a new probate listing agreement was executed and is attached. The estate is required to sell the property to pay a creditor's claim. Continuance of 60 days is requested.</p>	
		<p>Reviewed by: skc</p> <p>Reviewed on: 12/29/15</p> <p>Updates: 1/4/16</p> <p>Recommendation:</p> <p>File 9 – Medina</p>

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

DOD: 9/22/14	<p>JENNIFER A. WILLIAMSON, Sister, was appointed Executor with Full IEAE without bond on 11/3/14 and Letters issued on 11/10/14.</p> <p>Notice of Setting Status Hearing filed 1/22/15 set this status hearing re the filing of the first account or petition for final distribution.</p> <p>Status Report filed 12/9/15 states the estate includes an undivided one-half interest in the decedent's residence in Fresno which must be sold to pay estate expenses. The property has been listed with a broker for sale since approx. January 2015. The price has been reduced several times, but it remains unsold. The Executor requests the status hearing be continued for six months to allow the decedent's interest in the residence to be sold.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution pursuant to Probate Code §12200.</p>
Aff.Sub.Wit.		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: skc</p> <p>Reviewed on: 12/29/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10- Williamson</p>	

Petitioner states (Cont'd): Mark requested that Daniel record the deeds of the assets allocated to reflect that the assets were a part of Trust B and execute a promissory note for \$125,000.00 with Trust B as the holder and Trust A as the maker of the note. Properties include:

1. 6022 North Marty Ave., APN 106-362-06S
2. 1697 East Los Altos, APN 408-253-13
3. 6750 North Millbrook, APN 408-281-07
4. 2020 South Mary, APNs 468-341-03 and 04
5. 2003-2009 South Sarah, APNs 468-341-14 and 18

On 8/12/14, counsel for Daniel sent a letter that stated he would forward the request to Daniel and provide information as requested. On 8/15/14, Counsel for Daniel mailed the Notification by Trustee pursuant to Probate Code §16061.7 and a copy of the Trust to Mark. The Notification indicated that the trust was amended on 6/29/12, after Virginia's death. Mark did not receive the amendment or the accounting requested.

Again, on 8/26/14, Mark's counsel wrote a letter requesting the trust documents that Daniel had failed to provide and again requested accounting. Daniel's counsel sent a letter that the accounting should be completed within about two weeks. Mark received a trust accounting for the period of 10/1/13 through 6/30/14, but the accounting did not conform to Probate Code §16063.

To date, Daniel has not furnished accounting that complies with the probate code, or the trust amendments. Further, he has not provided a copy of the appraisal report for the values of the real property that were to be allocated to Trust B. Daniel has provided copies of the recorded deeds showing that the appropriate properties were allocated to Trust B except for 2020 South Mary and 2003-2009 South Sarah. Daniel has also not provided an executed promissory note for \$125,000.00 naming Trust B as the holder and Trust A as the maker of the note.

Petitioner provides authority and prays for relief as follows:

1. Finding that Trust B became irrevocable on 4/17/12;
2. Finding that the 6/29/12 amendment is not applicable to Trust B;
3. Finding that any amendment made after 4/17/12 is not applicable to Trust B;
4. Compelling the trustee to provide an accounting from 4/17/12 to present that complies with Probate Code §16063;
5. Compelling the trustee to provide all amendments to the trust;
6. Confirming the transfer of the following properties to the trust:
 - 6022 North Marty Ave., APN 106-362-06S
 - 1697 East Los Altos, APN 408-253-13
 - 6750 North Millbrook, APN 408-281-07
7. Instructing the trustee to transfer the following properties to Trust B:
 - 2020 South Mary, APNs 468-341-03 and 04
 - 2003-2009 South Sarah, APNs 468-341-14 and 18
8. Instructing the trustee to execute a promissory note for \$125,000.00 with Trust B as the holder and Trust A as the maker of the note;
9. Approving the division of the trust into Trust A and Trust B;
10. For attorneys' fees and costs as permitted by law; and
11. For such other relief the court deems just and proper.

Attorney Duggan, Mark (Pro Per Petitioner)
 Attorney Pimentel, Paul J. (for Respondent Daniel J. Duggan)

Status RE: Resolution

	<p>MARK DUGGAN, Remainder Beneficiary of Trust B, the irrevocable trust created under the Daniel J. Duggan and Virginia L. Duggan Revocable Living Trust dated 5/31/11, filed Petition for Findings and Orders to Compel an Accounting or Provide Information on the Trust: Confirm the Creation and Funding of Trust B; and Instructions on Validity of Trust Amendment.</p> <p>On 7/17/15, the parties filed a Stipulation as to various facts. The Court's order thereon was entered on 8/7/15.</p> <p>At the hearing on 8/11/15, the Court set this status hearing re resolution.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 9/29/15: Mr. McLain represents that he will be subbing out of this matter and Mr. Duggan will act in pro per, at which time he can begin communicating with Mr. Pimentel directly.</p> <p>Note: On 11/10/15, the matter was continued to 1/7/16 to meet up with Mr. McClain's Motion to be Relieved as Counsel for Mark Duggan; however, pursuant to Substitution filed 11/23/15, that motion has been taken off calendar. See Page C.</p>
Cont. from 092915, 111015		
Aff.Sub.Wit.		
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Inventory		
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Citation		
FTB Notice		
	Reviewed by: skc	
	Reviewed on: 12/29/15	
	Updates:	
	Recommendation:	
	File 13B - Duggan	

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 11/6/81	<p>ROSIE FLORES YBARRA and LUPE FLORES YBARRA, Daughters, were appointed Administrators with Full IAEA with bond of \$200,000.00 on 6/11/15. Letters issued 6/22/15.</p> <p>At the hearing on 6/11/15, the Court set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Final I&A filed 11/12/15</p>
Cont'd from 11215		
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Inventory		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 12/29/15
		Updates:
		Recommendation:
		File 14 - Ybarra

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 4/18/15	<p>JOHN F. LUTZ, Brother, was appointed Executor with Full IAEA without bond and Letters issued on 8/13/15.</p> <p>At the hearing on 8/13/15, the Court set this status hearing re the filing of the Inventory and Appraisal.</p>	NEEDS/PROBLEMS/COMMENTS:
		<p>1. Need Inventory and Appraisal pursuant to Probate Code §8800 or 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: 12/30/15
		Updates:
		Recommendation:
		File 15- Lutz

Petition for Letters of Administration

DOD: 2/24/15		<p>JIM CARTER of AJC Realty Solutions LLC in San Pablo, CA, and DEBRA BURGESS, of Quality Wholesale Homes LLC in Sacramento, CA, are Petitioners and request ??? (Petition is blank at #2b.)</p> <p>Petition does not request IAEA.</p> <p>Decedent died intestate</p> <p>Residence: Fresno Publication: Reedley Exponent (?)</p> <p>Estimated value of estate: Personal property: \$5,000.00 Real property: \$174,000.00 Total: \$179,000.00</p> <p>Probate Referee: Rick Smith</p> <p>Petitioners state known heirs have declined all rights to be named executor.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 10/29/15: Examiner notes provided in open court. The Court admonishes that publication in Reedley is not allowable.</p> <p>As of 12/29/15, nothing further has been filed. The following issues remain:</p> <p>Amended petition may be required for reasons including but not limited to the reasons listed on the following pages.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p> <p>Note: If granted, status hearings will be set for the filing of the Inventory and Appraisal and First Account or Petition for Final Distribution. At this time, dates are not provided, as it does not appear the petition is in a condition to go forward.</p>
Cont. from 092815, 102915			
<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 <input type="checkbox"/>		
<input checked="" type="checkbox"/>	Aff.Pub. <input type="checkbox"/>		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters <input type="checkbox"/>		
<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: 12/29/15			
Updates:			
Recommendation:			
File 16 – Manson			

1. The petition is blank at #2b; therefore, it is unclear who Petitioners are requesting to be appointed as administrator. (Note: Proposed order indicates Petitioners are appointed.)
2. Petitioners state “Known heirs have declined all rights to be named executor of Estate;” at #3f(1)(d); however, Petitioners do not state their relationship to the decedent or why they are entitled to Letters at #3f(2), and no declinations have been filed.

Two names are listed at #8: Gwendolyn Manson, sister, and Vera Jackson, no relationship stated. However, only Vera Jackson was served with Notice of Petition to Administer Estate, along with notice to Chase Bank.

Therefore:

- Need clarification as to Petitioners’ relationship to the decedent;
 - Need clarification as to Vera Jackson’s relationship to the decedent;
 - Need notice to Gwendolyn Manson, sister;
 - Need declinations from Gwendolyn Manson and Vera Jackson to serve as Administrator pursuant to priority provided in Probate Code §8461.
3. It appears Petitioners are requesting to waive bond. Need waivers from the above relatives or bond of \$179,000.00.
 4. The decedent resided in the City of Fresno; however, Petitioners published in the Reedley Exponent. Need republication pursuant to Probate Code §8121(b) and Local Rule 7.9.
 5. The petition does not include a request for powers under the IAEA, but the publication did include IAEA language and the proposed order includes IAEA. Need clarification.
 6. Petitioners filed a document titled “Decedent Name Change Correction” on 10/20/15 requesting correction from “Jerald A. Manson” to “Jerald E. Manson.”

However, Petitioners did not properly petition the Court to change the name of the case or add this alias, and the publication only reflected “Jerald A. Manson.”

Therefore, formal request with Court order or amendment of this petition may be required, and republication may also be required.

7. The petition is blank at #5a(2)(a) and (b). Was the decedent’s spouse deceased or was decedent divorced or never married? If deceased, need date of death pursuant to Local Rule 7.1.1.D.
8. The petition is blank at #5a(3) and (4). Was the decedent survived by a registered domestic partner?
9. The petition is blank at #5a(7) and (8). Was the decedent survived by issue of a predeceased child?
10. The petition indicates a page is attached, but no page is attached.
11. Need Letters.

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

DOD: 5/8/14		KELLI FRYE , Sister, and MARGARET PARSONS , Mother, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	<u>Need amended petition. Issues include, but may not be limited to, the following:</u>
Cont. from 100615, 110515		No other proceedings	
<input type="checkbox"/>	Aff.Sub.Wit.	I&A: <i>Incomplete</i>	1. Pursuant to Probate Code §6402(b), if there is no surviving issue, the estate passes to the decedent's parent or parents equally. Siblings do not take unless both parents are deceased. Petitioner does not state whether the decedent's father is living or deceased. If deceased, need date of death per Local Rule 7.1.1.D.
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Decedent died intestate	2. Need completed I&A. The I&A attached to the petition has not been completed by the Probate Referee for valuation of the real and personal property pursuant to Probate Code §13151. <u>Note:</u> Petitioners include valuations of the personal property at Attachment 1; however, these items must be appraised by the Probate Referee. See Probate Code §§ 13152(b), 8900 et seq.
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Petitioners state the decedent was survived by his mother, sister, and brother. The decedent's brother signed a Disclaimer of Interest.	3. Attachment 11 does not state the decedent's interest in the real and personal property.
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail	Petitioners request Court determination that the decedent's real and personal property passes to them as joint tenants with right of survivorship.	4. The same PO Box is listed as the address for all relatives at #14. For the amended petition, need clarification and notice to each person directly. CRC 7.51.
<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		
<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: 12/29/15
			Updates:
			Recommendation:
			File 17 – Carter

Petitioner Herminia Orozco Serna (Pro Per)

Petition for Appointment of Guardian of the Person

	TEMPORARY GRANTED ON COURT'S OWN MOTION EXPIRES 1/7/2016		NEEDS/PROBLEMS/COMMENTS: Continued from 11/12/2015. Minute Order states examiner notes provided in open court. The Court gives permission for mail service with the new hearing date and a copy of the petition as to Jose Serna, father. Petitioner represents that the paternal grandfather's name is Alfredo Zepeda and that he resides in Mexico; she is to inquire of the mother as to the maternal grandfather's name. The matter is continued for service of the stated individuals; temporary orders are granted and Letters are to issue forthwith.
	HERMINIA O. SERNA, paternal grandmother, is Petitioner.		
	<i>~Please see Petition for details~</i>		The following issues from the last hearing remain: 1. Need proof of service by mail of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence, for: <ul style="list-style-type: none"> • Alfredo Zepeda, paternal grandfather, if Court does not find due diligence per Declaration filed 12/31/2015. • Jason Engle, maternal grandfather, if Court does not find due diligence per Declaration filed 12/31/2015, showing only that his last known employer is unknown. • Maternal grandmother.
	Court Investigator's Report was filed on 10/26/2015.		
	Conf. from 11215		Note: Proof of Personal Service filed 12/31/2015 shows a person named JESSICA MARQUEZ was personally served on 12/26/2015; however, the relationship of this person to the child is not stated.
	<input type="checkbox"/> Aff.Sub.Wit.		
	<input checked="" type="checkbox"/> Verified		Reviewed by: LEG
	<input type="checkbox"/> Inventory		
	<input type="checkbox"/> PTC		Reviewed on: 12/30/15
	<input type="checkbox"/> Not.Cred.		
	<input checked="" type="checkbox"/> Notice of Hrg		Updates: 1/4/16
	<input checked="" type="checkbox"/> Aff.Mail	W/O	
	<input type="checkbox"/> Aff.Pub.		Recommendation:
	<input type="checkbox"/> Sp.Ntc.		
	<input checked="" type="checkbox"/> Pers.Serv.		File 18- Serna
	<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		
	<input checked="" type="checkbox"/> CI Report		
	<input checked="" type="checkbox"/> Clearances		
	<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		

19 Beverly Christiansen (CONS/PE) Case No. 15CEPR00976
 Attorney LeVan, Nancy J. (for Ronald Christiansen – Spouse – Petitioner)
 Attorney Horton, Lisa (Court appointed for Proposed Conservatee)
 Objector Washburn, Kimberly M. (Pro Per – Daughter – Objector)
 Objector Macedo, Robbyn L. (Pro Per – Daughter – Objector)
 Objector Smith, Robert M. (Pro Per – Son – Objector)

Petition for Appointment of Probate Conservator of the Person and Estate

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 10/15/15 and 10/27/15. Voting rights affected – need minute order Minute Order 11/12/15: Ms. LeVan reports that she has not yet seen the filed objections. The Court orders that the Public Guardian is appointed as temporary Conservator of the Person and Estate; Letters are to issue from the minute order. All assets and paperwork are to be turned over to the Public Guardian immediately. No family member is entitled to assets at this time. The Public Guardian is to take control of Beverly's pension as well. Ms. LeVan's Response is due by 12/10/15. Response to Objection was filed 12/30/15	
Cont'd from 11215				
	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			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
		Reviewed by: skc Reviewed on: 12/29/15 Updates: 1/5/16 Recommendation: File 24 - Christiansen		

Spousal or Domestic Partner Property Petition

DOD: 02/05/64	EVELYN S. DICKENS , Administrator of the Estate of Margaret M. Anderson, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Attachment 7 filed 12/10/15 is vague and does not specifically state whether Margaret was still married to Bradford at the time of his death. Need clarification.</p> <p>Note: Spousal property petitions should clearly specify the facts upon which petitioner bases the allegation that the property should pass to them, including dates of marriage, dates of death, whether the property was purchased during the marriage, whether the parties were still married at the time of death, etc.</p>
	No other proceedings.	
	Decedent died intestate.	
Cont. from 111915	Petitioner states: Bradford Anderson and Margaret Anderson were married when they purchased the real property as reflected on the deed. Bradford Anderson died intestate, resulting in the community property going to his spouse. Margaret Anderson passed away prior to filing a Spousal Property Petition and therefore, Petitioner is filing this Petition on behalf of Margaret's estate.	
<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.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters	Petitioner requests court confirmation that ½ interest in real property in Laton, CA identified as APN: 057-140-06 belongs to her and that ½ interest passes to her pursuant to intestate succession.	
<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: JF
		Reviewed on: 12/30/15
		Updates:
		Recommendation:
		File 20 – Anderson

Petition for Appointment of Guardian of the Person

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Notice of Hearing filed 11/5/15 indicates personal service on the mother on 11/4/15, but does not indicate that a copy of the petition was included, and also indicate two separate addresses for service, so it is unclear where she was served. See also Declaration filed 1/5/16. The Court may require further service on the mother per Probate Code §1511.</p> <p>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 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on the following relatives:</p> <ul style="list-style-type: none"> - Paternal Grandfather - Paternal Grandmother - Maternal Grandfather - Sarah Salas (Maternal Grandmother) - Joseph Aguilar (Sibling) - Desire Alvarez (Sibling) - Kaylen Madrigal (Sibling) 	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w/o
✓	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: 12/30/15	
			Updates: 1/5/16	
			Recommendation:	
			File 21- Menchaca	

Petition for Appointment of Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
N/A	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			
			Reviewed by: skc	
			Reviewed on: 12/30/15	
			Updates: 1/5/16	
			Recommendation:	
			File 22- Diaz	

Petition for Appointment of Guardian of the Person

See petition for details.			<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Child Information Attachment Form GC-210(CA), which contains mandatory information regarding the child, her family, and Petitioner, including ICWA inquiry information. See Probate Code §1510(c). 2. If diligence is not found, need notice to father, paternal grandparents, and maternal grandfather pursuant to Probate Code §1511. 	
	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			
				Reviewed by: skc
				Reviewed on: 12/30/15
				Updates:
			Recommendation:	
			File 23- Cairns	

Petition for Appointment of Guardian of the Estate

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p> <p>Note: If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> • Thursday April 7, 2016 for the filing of the Inventory and Appraisal pursuant to Probate Code §2610 • Thursday March 9, 2017 for the filing of the first account pursuant to Probate Code §2620. <p>If the proper items are on file prior to the status dates per Local Rule 7.5, the status dates may come off calendar.</p>	
	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			
			Reviewed by: skc	
			Reviewed on: 12/30/15	
			Updates: 1/5/16	
			Recommendation:	
			File 24- Lanuza	

NEEDS/PROBLEMS/COMMENTS:

1. Pursuant to Local Rule 7.15.2, is the policy of the Court to grant only those independent powers necessary in each case to administer the estate. A request for all powers under §2591 will not be granted by the court. Each independent power requested must be justified by, and narrowly tailored to the specific circumstances of the case. Therefore, need clarification as to exactly what powers are requested and the reasons why.
2. Petitioner requests to waive bond, but also requests §2590 powers, which would allow the guardian to make transactions regarding the minor's interest in the real property without Court oversight. Because Petitioner is requesting powers under Probate Code §2590, the Court may require bond of at least \$23,833.34 pursuant to Probate Code §2320, which includes cost of recovery.

Petition for Appointment of Probate Conservator of the Person

		TEMPORARY EXPIRES 1/7/16	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 12/15/15.</p> <p>Voting Rights Affected need minute order.</p> <p>1. Capacity Declaration of Dr. Robert Lonjers filed on 11/30/15 is not initialed at 7b as required in support of medical consent powers. In addition, the dementia attachment is incomplete (completely blank) at 9a(1)-9a(3), 9a(5), 9b(1) – 9b(3) and 9a(5).</p>
		LaDONNA SCHWEIKERT, daughter, is petitioner	
		Please see petition for details.	
Conf. from		Declaration of Court appointed attorney Janet Wright filed on 12/9/15	
<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.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" 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 type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation	W/	
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 1/4/16
			Updates:
			Recommendation:
			File 25- Robertson

26 Glenda F. Garcia aka Glenda Cortez Clark (Estate) Case No. 15CEPR01180

Attorney J. Patrick Sullivan, of Visalia (for Petitioner Michael Clark)

**Petition for Probate of [Lost] Will and for Letters of Administration with Will Annexed;
Authorization under Independent Administration of Estates Act**

DOD: 11/6/1995	MICHAEL CLARK , son, is Petitioner and requests appointment as Administrator with [Lost] Will Annexed with Full IAEA without bond (<i>All heirs waive bond</i>).	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. <i>Attachment 3(d)</i> to the <i>Petition</i> states that this estate does not have any assets, that it is being opened because it is a Defendant in a Quiet Title action, and that an Administrator needs to accept service of the summons and complaint, thus Petitioner requests to waive bond. <i>Petition</i> also states that if in the future property is discovered, an amended petition will be filed and a bond will be requested. Need the following information for the Court to determine whether to appoint an Administrator or whether to more appropriately appoint a Special Administrator during the pendency of the quiet title action:</p> <ul style="list-style-type: none"> • Case number and current status of the quiet title action (Court records do not show a pending action against the Decedent). • Estimated likelihood that property of Decedent may be discovered or recovered (and estimated value), requiring administration via a full probate proceeding.
	Full IAEA — OK	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	<u>Copy of Lost Will dated 8/19/1983</u> identifies the Decedent as GLEND A CORTEZ CLARK , and devises Decedent's home located in Fresno in equal shares to her children, MICHAEL CLARK (Petitioner) and LISHA CORTEZ .	
<input type="checkbox"/> Inventory		
<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		
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Estimated value of the Estate: No assets	
<input type="checkbox"/> Pers.Serv.	Probate Referee: Steven Diebert	
<input type="checkbox"/> Conf. Screen	Petitioner states in Declaration of Michael Clark filed 12/24/2015:	
<input checked="" type="checkbox"/> Letters	<ul style="list-style-type: none"> • At the time of Decedent's death, she was married to LEONARD L. GARCIA; • Petitioner does not believe any probate proceedings were ever started for Decedent's estate; • When Mr. Garcia died on 7/13/2015, his heirs discovered a piece of property which Mr. Garcia had incorrectly transferred to himself using an affidavit of death of joint tenant; • The property was in Decedent's name alone, thus a cloud on title has been discovered; • In Mr. Garcia's personal belongings, a copy of the Decedent's Will was discovered; the original Will was not located (<i>copy of Will attached to Petition</i>); 	
<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		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice	~Please see additional page~	
		Reviewed by: LEG
		Reviewed on: 1/4/16
		Updates:
		Recommendation:
		File 26- Garcia

Petitioner states, continued:

- Petitioner is familiar with his mother's (Decedent's) signature and the Will of 8/19/1983 does contain his mother's signature;
- Petitioner does not know the location of the original Will or of either of the witnesses;
- Petitioner cannot advise the Court of the whereabouts of the witnesses, as they are unfamiliar to him; Petitioner's attorney, through the internet, has been trying to locate the witness but there is not much information available;
- Petitioner cannot advise the Court that the signatures on the Will are true and correct signatures of the witnesses;
- In the event that the Court does not want to admit the Will to probate, then Petitioner requests the Court to simply allow the petition to proceed through intestate succession; the results for the beneficiaries will be the same;
- The only heirs to his mother's estate are Petitioner and his sister, **LISHA CORTEZ**.

NEEDS/PROBLEMS/COMMENTS, continued:

2. Probate Code § 8223 provides a petition for probate of a lost will shall include a written statement of the testamentary words or their substance. If the will is proved, the provisions of the will shall be set forth in the order admitting the will to probate. Pursuant to Probate Code § 8223, the proposed order appointing Administrator with Will Annexed submitted by the Petitioner contains the provisions of the lost Will attached to the order, if the Court determines admission of the lost Will is appropriate. Petitioner also submitted an alternative proposed order appointing administrator without admitting the lost Will to probate. Under either of Petitioner's proposed orders, no IAEA authority will be granted, and Petitioner will be required to petition the Court to take most actions of administering the estate, since no independent authority will be authorized. However, if Court determines a Special Administrator is appropriate, the lost Will need not be admitted at this time, and Petitioner may be granted the specific powers useful for carrying out the purposes stated by Petitioner. Court may determine special administration is appropriate and require Petitioner to submit proposed order appointing special administrator, with an Attachment 3(d)(2) specifying the special powers (i.e., defense of quiet title action to include accepting service of summons and complaint.)
3. Two sets of proposed letters were submitted by Petitioner: one set of letters in the event the Court admits the lost Will and appoints Petitioner as administrator with Will annexed, and in the alternative, one set of letters in the event the Court appoints Petitioner as administrator without admitting the lost Will. These proposed letters do appear not to contain the original signature of the Petitioner as required. If Court determines full probate administration is appropriate, need proposed letters containing the original signature of Petitioner.

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS, continued:

4. As an alternative to opening a full probate proceeding, if Court determines appointment of a Special Administrator is appropriate, an estimated duration for the special administration will be needed, and proposed order and letters with an expiration date for the special administration is required. Proposed letters shall include the expiration date for the *Letters of Special Administration*, pursuant to Probate Code § 8542. Petitioner may be required to provide the Court with an estimated expiration date covering the span of the pending quiet title action, and to submit proposed *Letters of Special Administration* with an expiration date for the letters, at which time no further proceedings would be needed unless property is discovered or recovered for the estate. Court would set a Status Hearing near the expiration date, at which time Petitioner may request the letters of special administration be extended, if necessary.

Note: If the Petition for Appointment of Administrator, with or without Lost Will Annexed, is granted, the Court will set status hearings as follows:

- **Tuesday, June 7, 2016 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and**
- **Monday, March 7, 2017 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution.**

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.

Note: If Court determines appointment of a Special Administrator is appropriate, the Court will set a status hearing as follows:

- **Wednesday, August 17, 2016 at 9:00 a.m. in Dept. 303 for status of special administration.**

Petition for Appointment of Temporary Guardian of the Person

Age: 1		<u>GENERAL HEARING: 02/16/16</u>		NEEDS/PROBLEMS/COMMENTS:	
		<p>ANASTASIA CLARK, non-relative, is Petitioner.</p> <p>Father: NOT LISTED</p> <p>Mother: HALENA VELASQUEZ – Consent & Waiver of Notice filed 12/17/15</p> <p>Paternal grandparents: UNKNOWN</p> <p>Maternal grandparents: UNKNOWN</p> <p>Petitioner states [see file].</p>		<ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Father 	
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 type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Aff.Mail				
<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 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 checked="" type="checkbox"/>	UCCJEA				
<input type="checkbox"/>	Citation				
<input type="checkbox"/>	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 01/04/16	
				Updates:	
				Recommendation:	
				File 27- Burke	

Petitioner Gonzales, Ramona (pro per – guardian/maternal grandmother)
 Petitioner Barrera, Kenda L. (pro per – mother)

Petition for Appointment of Temporary Guardian of the Person

Anthony, 13	<u>GENERAL HEARING: 02/18/16</u>		NEEDS/PROBLEMS/COMMENTS: This Petition is regarding Gabriel only . Petitioner was appointed Guardian of Anthony on 04/05/04. Note: Mother, Kenda Bouhaben, filed a Petition to terminate the guardianship of Anthony Barrera on 11/16/15 (hearing set for 01/25/16). 1. Need Notice of Hearing. 2. Need proof of personal service at least 5 court days before the hearing of <u>Notice of Hearing</u> with a copy of the <u>Petition for Appointment of Temporary Guardian of the Person</u> or Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Danny Barrera (father) b. Kenda Bouhaben (mother) Note: Proof of Service included on the Notice of Hearing (form GC-020P) should be used in Probate Guardianship matters. Use of other forms for proof of service may result in the need to re-file on the proper form.
Gabriel, 9	RAMONA GONZALES, maternal grandmother, is Petitioner. Father: DANNY BARRERA Mother: KENDA BOUHABEN Paternal grandparents: DECEASED Maternal grandfather: PEDRO GONZALES Siblings: DANIEL BARRERA, JR., EDWARD BARRERA, SANDRA BARRERA		
Cont. from	Petitioner states [see file for details]. Answer to Petition for Appointment of Temporary Guardian of the Person filed 01/04/16 by Kenda Bouhaben (mother) states [see file for details].		
<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 type="checkbox"/> Notice of Hrg	x		
<input type="checkbox"/> Aff.Mail			
<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			
<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 checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: JF Reviewed on: 01/04/16 Updates: Recommendation: File 28- Berrera & Barrera

Petition for Appointment of Temporary Guardian of the Person

Age: 17		<u>GENERAL HEARING: 02/22/16</u>		NEEDS/PROBLEMS/COMMENTS:		
		<p>KAITLYN MILAM, non-relative, is Petitioner.</p>		<p>1. Need <i>Notice of Hearing</i>.</p> <p>2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for:</p> <p>a. Mark Pierce (father)</p> <p>b. True Richardson (mother)</p>		
		<p>Father: MARK PIERCE</p>				
Cont. from		<p>Mother: TRUE RICHARDSON</p>				
<input type="checkbox"/>	Aff.Sub.Wit.	<p>Paternal grandfather: BOB PIERCE Paternal grandmother: KATHY PIERCE</p> <p>Maternal grandfather: DONALD RICHARDSON Maternal grandmother: JANICE RICHARDSON</p> <p>Siblings: ALLISON RICHARDSON, TYLER PIERCE, ADAM RICHARDSON</p> <p>Petitioner states: [see file for details].</p>				
<input checked="" type="checkbox"/>	Verified					
<input type="checkbox"/>	Inventory					
<input type="checkbox"/>	PTC					
<input type="checkbox"/>	Not.Cred.					
<input type="checkbox"/>	Notice of Hrg					x
<input type="checkbox"/>	Aff.Mail					
<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					
<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 checked="" type="checkbox"/>	UCCJEA					
<input type="checkbox"/>	Citation					
<input type="checkbox"/>	FTB Notice					
				Reviewed by: JF		
				Reviewed on: 01/04/16		
				Updates:		
				Recommendation:		
				File 29- Pierce		