



## 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.

**Probate Status Hearing RE: Next Account**

	<b>JEFFREY H. DALE</b> , Spouse, is Successor Conservator of the Estate with bond of \$340,000.00.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>Minute Order 11/10/15</u> 11/10/15:</b>  <b>Continued to meet up with the Demurrer and Motion to Strike set for 1/12/16 (McLain Trust 11CEPR00028).</b></p> <p><b>Note: Attorney Gordon Panzak is Conservator of the Person.</b></p> <p><b>1. Need Fourth Account or written status report pursuant to Local Rule 7.5.</b></p>
	Conservator's Third Account covering five separate account periods from 1/12/10 through 6/30/14 was settled on 2/4/15.	
	At the hearing on 2/4/15, the Court set this status hearing for the filing of the next account.	
<b>Cont. from 093015, 111015</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
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<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 1/7/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2 – Dale</b>

**Petition for Approval of Trustee's Second Account Current, for Approval of Trustee's Fees, and for Authorization to Pay Fees and Costs of Counsel for the Trustee**

		<b>PERINE &amp; DICKEN</b> , Trustee, is Petitioner.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Costs include court call in the amount of \$86.00 and runner services for the filing of the first account in the amount of \$45.00. Local Rule 7.17B.5 and 7.17B.7 indicates that telephonic appearance costs and runner services are considered by the court to be a part of the cost of doing business and are therefore no reimbursable. Therefore allowable costs appear to be the filing fee of \$200.00.</p> <p>2. Disbursement schedules shows a total of \$2,470.34 paid to Stifel Nicholas for "advisory fee." Court may require more information about this charge.</p>
		<b>Account period: 7/1/2014 – 6/30/2015</b>	
		Accounting - <b>\$605,519.45</b>	
		Beginning POH - <b>\$555,101.64</b>	
		Ending POH - <b>\$563,782.90</b> (\$49,397.83 is cash)	
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	Trustee - <b>\$5,743.75</b> <b>(paid)</b> <i>(itemized at Exhibit D; for 45.95 hours @ \$125.00 per hour; Order Establishing SNT filed 7/22/2013 authorizes Trustee fees of up to maximum of \$1,500.00 per month subject to Court approval;)</i>	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>	Attorney - <b>\$3,249.00</b> <i>(itemized at Exhibit C; for 8.10 hours @ \$250.00 attorney rates per hour and 13.60 hours @ \$90.00 paralegal and bookkeeper rates per hour;)</i>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>	Costs - <b>\$331.00</b> <i>(filing fee, runner service and court call)</i>	
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>	Bond - <b>\$646,000.00</b> <i>(Petitioner requests reduced bond of \$643,000.00;)</i>	
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
<b>Please see additional page</b>			
		<b>Reviewed by:</b> KT	
		<b>Reviewed on:</b> 1/7/16	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 4- Davis-Maynard</b>	

**4 Jayden Davis-Maynard Special Needs Trust Case No. 13CEPR00416**

**Petitioner prays for an Order:**

1. Approving, allowing and settling the Second Account and Report of the Trustee;
2. Approving as just and reasonable the Trustees' fees charged to the SNT from 7/1/2014 to 6/30/2015;
3. Authorizing payment of the Attorney fees and costs;
4. Authorizing bond be reduced to **\$643,000.00**;

**7A Richard C. Strong (Estate) Case No. 13CEPR00703**

**Attorney Erlach, Mara M. (for Pamela Strong – Former Executor)**

**Attorney Kruthers, Heather (for Public Administrator – Successor Executor)**

**Probate Status Hearing Re: Filing of the Final Account**

<b>DOD: 07/13/2013</b>	<b>PAMELA STRONG</b> , spouse, was appointed Executor with limited IAEA authority without bond on 09/16/2013. Letters issued on 09/14/2013.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Page 7B is a Confidential Fee Waiver Hearing.</b>
		<b><u>OFF CALENDAR.</u></b>
		<b><u>Report of Insolvent Estate and Request for Discharge of Public Administrator filed 12/30/2015. Hearing set for 02/17/2016.</u></b>
<b>Cont. from 072815, 110315</b>	Pursuant to Minute Order of 03/24/2015 the Public Administrator was appointed. Minute Order states: based on the information contained in the Status Report, the Court finds good cause to remove Pamela Strong as Executor and appoints the Public Administrator forthwith.	<b>Minute Order of 11/03/2015: Counsel requests 60 days. No appearance is necessary on 01/12/2016 if the petition is filed at least two court days prior.</b>
<b>Aff.Sub.Wit.</b>		1. Need Final Account.
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>	Minute Order of 03/24/2015 set this status hearing for the filing of the First and Final Account.	
<b>Notice of Hrg</b>	<b>Status Report Regarding Failure to File Final Account filed 10/23/2015 by the Public Administrator</b> states the attorney, Mara Erlach, on behalf of her client, Pamela Strong, filed a status report that she had lost contact with her client and that she believed through a third party that Pamela Strong moved to Southern California and was hospitalized. On 03/24/2015, the Court removed Pamela Strong as the Administrator and appointed Public Administrator (PA) as successor. At the hearing, the PA requested a continuance to further investigate this case. The PA provided the following information to County Counsel on 08/06/2015:	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: LV</b>
		<b>Reviewed on: 01/07/2016</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 7A – Strong</b>
	<b><u>Please see additional page</u></b>	

**7A(additional page) Richard C. Strong (Estate) Case No. 13CEPR00703**

During the time Pamela Strong was Executor, there were two offers on the home on Wood Duck, one on 04/09/2014 for \$275,000.00, and a second all cash offer for \$225,000.00 on 04/15/2015. Both were intended to be Short Sales, but neither sale was completed. Subsequently, the PA found on the Recorder's website a Notice of Trustee's Sale scheduled for 06/01/2015. The total unpaid balance with costs, expenses and advances at the time of the initial Notice of Sale was listed as \$328,793.07. The PA contacted the Trustee, The Mortgage Law Firm, PLC in Temecula, and learned that the Trustee's Sale was continued to 07/10/2015, at which time the property was sold for \$265,201.00. The total costs at the time of this sale were reportedly in excess of \$384,000.00. The Probate Petition lists the Wood Duck Circle home as having a value of \$321,124.00 and encumbrances of \$296,057.00, leaving a net value of the property of \$25,067.00.

- There was nothing in the former attorney's file concerning the location of disposition of the \$40,000.00 listed in the Partial No.:1 Inventory.
- There is one Creditor Claim for \$217.45 from Capital One, dated 01/08/2015, which has been neither approved nor denied. The First and Final Account prepared and filed on 01/15/2015 by the former attorney indicates that no claims were presented to the estate, which appears to be inaccurate.
- At the time of Richard Strong's death, Pamela Strong was residing at 774 E. Wood Duck Circle, Fresno, Ca. 93730, according to the Probate Petition. On a Notice of Change of Address filed by Ms. Erlach, dated 11/13/2014, Pamela Strong's address was listed as 829 Chickadee Court, Fresno, Ca. 93730.
- The beneficiaries of the estate are:  
Holy Spirit Church \$1,000.00 cash gift  
Pamela J. Strong All other property
- Included with the former attorney's filed was a \$1000.00 check written to Holy Spirit Catholic Church, dated 12/02/2014, from account no. 1340591686 from Pamela Strong. This check appears to have been mailed on the same date to Ms. Erlach at McCromick Barstow and received 12/05/2014. The return address for Pamela Strong as of the date on the envelope is 754 Robin Lane, Fresno, Ca.

The PA provided the following additional information on 10/20/2015.

- The PA attempted to contact Pamela Strong at the Robin Lane address, but she no longer lives there. There is an indication that she lives in Irvine Ca. The PA will attempt to call her at the number found. Her son Andrew Strong reportedly lives in Fresno, but the PA believes he will not talk to them because of criminal/probation matter. They will attempt anyway.
- Since the PA has the account number from which the \$1,000.00 check was issued, she will call the bank to determine the status of the \$40,000.00 listed on the I&A by the former administrator.

The PA estimates that it will take another 60 days to complete her investigation and file a final report. Therefore, she requests that the next status hearing be set no sooner than December 15, 2015.

**7B Richard C. Strong (Estate) Case No. 13CEPR00703**

Attorney Erlach, Mara M. (for Pamela Strong – Former Executor)

Attorney Kruthers, Heather (for Public Administrator – Successor Executor)

Fee Waiver Hearing

	<b>PUBLIC ADMINISTRATOR</b> is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		1. Need Order.
<b>Cont. from</b>		
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	
<input type="checkbox"/>	<b>Verified</b>	
<input type="checkbox"/>	<b>Inventory</b>	
<input type="checkbox"/>	<b>PTC</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>	
<input type="checkbox"/>	<b>Notice of Hrg</b>	
<input type="checkbox"/>	<b>Aff.Mail</b>	
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<input type="checkbox"/>	<b>Pers.Serv.</b>	
<input type="checkbox"/>	<b>Conf. Screen</b>	
<input type="checkbox"/>	<b>Letters</b>	
<input type="checkbox"/>	<b>Duties/Supp</b>	
<input type="checkbox"/>	<b>Objections</b>	
<input type="checkbox"/>	<b>Video Receipt</b>	
<input type="checkbox"/>	<b>CI Report</b>	
<input type="checkbox"/>	<b>9202</b>	
<input type="checkbox"/>	<b>Order</b>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Aff. Posting</b>	
<input type="checkbox"/>	<b>Status Rpt</b>	
<input type="checkbox"/>	<b>UCCJEA</b>	
<input type="checkbox"/>	<b>Citation</b>	
<input type="checkbox"/>	<b>FTB Notice</b>	
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 01/07/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 7B - Strong</b>

**7B**

**9 Destiana Jaurique, Denicio Jaurique, & Alyssa Jaurique (GUARD/P)**  
**Case No. 13CEPR00814**

**Petitioner** Cynthia Piombino (Pro Per)  
**Objector** George D. Jaurique (Pro Per)

**Petition for Removal of Co-Guardian**

		<b>CYNTHIA PIOMBINO</b> , paternal grandmother and Co-Guardian, is Petitioner.	<p><b>NEEDS/PROBLEMS/ COMMENTS:</b></p> <p><b>Continued from 11/10/2015.</b> Minute Order states examiner notes provided in open court. Mr. Jaurique objects for the record. Ms. Piombino's additional information is to be filed and served no later than 11/30/2015; Mr. Jaurique's written objections are to be filed and served no later than 12/28/2015. [Please see additional page for Petitioner's declaration filed 11/25/2015 and Co-Guardian's objections filed 12/28/2015.]</p> <p><b>Reviewed by:</b> LEG  <b>Reviewed on:</b> 1/7/16  <b>Updates:</b>  <b>Recommendation:</b>  <b>File 9 - Jaurique</b></p>
		<b>CYNTHIA PIOMBINO</b> , paternal grandmother, and <b>GEORGE JAURIQUE</b> , paternal grandfather, were appointed Co-Guardians on 11/14/2013.	
<b>Cont. from 111015</b>			
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	W/	
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
✓	<b>Pers.Serv.</b>	W/	
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
	<b>Order</b>	X	
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

*~Please see Petition for details~*

**Declaration filed by Petitioner CYNTHIA PIOMBINO on 11/25/2015.**

**Objection to Petition for Removal of Co-Guardian filed by GEORGE D. (DANNY) JAURIQUE, paternal grandfather and Co-Guardian, on 12/28/2015.**

**10 Ayden Medeiros & Ayla Lopez (GUARD/P) Case No. 14CEPR00219**

Petitioner Medeiros, Brandy (Pro Per – Paternal Grandmother – Petitioner)

Petitioner Franco, Elaine (Pro Per – Maternal Grandmother – Petitioner)

**Petition for Appointment of Guardian of the Person (Prob. Code §1510)**

		See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Minute Order 12/1/15:</u> Matter continued due to the remaining service defects as to Bernard Garcia, father of Ayla, and Louie Ponce, paternal grandfather of Ayden.</p> <p><u>Note:</u> It appears all notice issues have been cured.</p> <p><u>Note:</u> On 12/31/15, Petitioner Brandy Medeiros filed a Declaration providing an agreement and schedule of visitation and residence between the two petitioners designating holidays.</p>	
Cont. from 102715, 120115				
	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: 1/7/16	
			Updates:	
			Recommendation:	
			File 10 – Medeiros/Lopez	

Attorney Mele, James J. (for Executor Juan Carlos Valencia, Jr.)

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

<b>DOD: 3/21/2014</b>	<b>JUAN CARLOS VALENCIA, JR.</b> , son, was appointed Executor with Full IAEA authority without bond on 7/7/2014.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 9/8/2015.</b> Minute Order states counsel requests 120 days.</p>
<b>Cont. from 090815</b>	<b>Letters issued on 7/10/2014.</b>	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	<b>Pursuant to Probate Code § 8800(b)</b> , Final Inventory and Appraisal was filed 7/22/2014 showing an estate value of <b>\$200,000.00</b> .	
<input checked="" type="checkbox"/> <b>Verified</b>	<b>Pursuant to Probate Code § 12200</b> , first account and/or petition for final distribution was due <b>7/10/2015</b> .	
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>		
<input type="checkbox"/> <b>Notice of Hrg</b>	<b>Minute Order dated 7/7/2014</b> from the hearing on the petition for probate set this status hearing on 9/8/2015 for filing of the first account and/or petition for final distribution.	
<input type="checkbox"/> <b>Aff.Mail</b>		
<input type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>	<b>Declaration of James J. Mele Re Status filed on 12/23/2015 states:</b>	
<input type="checkbox"/> <b>Conf. Screen</b>	<ul style="list-style-type: none"> <li>The sole asset of the estate was real property that has been sold for <b>\$170,000.00</b>;</li> <li>Terms were <b>\$150,000.00</b> cash and a note for <b>\$20,000.00</b>, payable monthly for 2 years until April 2017, pursuant to Notice of Proposed Action;</li> <li>Payments were to begin on 4/1/2015; thereafter, the buyer fell into default on the Note and steps were taken to resolve the default;</li> <li>The default was cured; however, it now appears that the buyer is again in default on said Note and steps are being taken to resolve the default;</li> <li>Further, there were substantial Medi-Cal liens filed in this matter; those liens have recently been satisfied and Satisfactions have just been received;</li> <li>It is respectfully requested that this matter be continued an additional <b>120 days</b> to allow for resolution or foreclosure of the Note Secured by Deed of Trust.</li> </ul>	
<input type="checkbox"/> <b>Letters</b>		
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input checked="" type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 1/7/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 11 – Ledesma</b></p>

13A  
Atty  
Atty  
Atty

**Octavio & Mary Ruelas 2001 Family Trust**

Case No. 14CEPR00929

Walters, Jennifer L. (for Irma Hicks – Co-Trustee – Petitioner)  
Donohue, Francis T, III, (of Newport Beach, CA, for Jesse Joe Ruelas – Co-Trustee – Objector)  
Ruelas, Angela (Pro Per – Beneficiary – Objector)

**Petition for Instructions Regarding Life Estate of Angela Ruelas and Removal of Co-Trustee of The Octavio and Mary Ruelas Family Trust**

<p><b>Octavio Ruelas</b> DOD: 6-7-06</p>	<p><b>IRMA HICKS</b>, a Co-Trustee of the Octavio and Mary Ruelas Family Trust, is Petitioner.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<p><b>Mary Ruelas</b> DOD: 6-11-14</p>	<p><b>Petitioner states</b> she and <b>JESSE JOE RUELAS</b> were named as joint successor trustees; however, since Mary Ruelas' passing, Jesse Ruelas has not been abiding by this provisions of the trust and has been making decisions regarding trust property without Petitioner's approval or knowledge.</p>	<p><u>Minute Order 11/10/15: Counsel represent that all parties have signed the agreement and a request for dismissal of the petition is forthcoming. The matter will come off calendar on 1/12/16 if the dismissal is filed and granted.</u></p>
<p><b>Cont from 120114, 012615, 081115, 092915, 111015</b></p>	<p>Article VIII, Section C of the trust provides a life estate in the trust property located at 61 N. DeWitt Ave., in Clovis to Angela Ruelas, and states that should Angela Ruelas choose not to live in said property or upon her death, the property shall be held in trust with any income distributed in equal shares to the seven heirs, approx. 14.28% each.</p>	<p><u>Update: Declaration of Jennifer Walters filed 1/5/16 provides the signed settlement agreement; however, no Request for Dismissal has been filed.</u></p>
<p><input type="checkbox"/> <b>Aff.Sub.Wit.</b></p>	<p>Petitioner states Angela has indicated she would be granting residency in the property to Christina Ruelas, who is Co-Trustee Jesse Ruelas' daughter. Angela indicates she has made personal arrangements with Christina regarding rent and the monies are being collected by Angela without any benefit to the trust.</p>	<p><u>The following items remain noted for reference: SEE LAST PAGE.</u></p>
<p><input checked="" type="checkbox"/> <b>Verified</b></p>	<p>Petitioner states the beneficiaries, all siblings, cannot come to an agreement as to whether this is an acceptable method for Angela to secure her life estate.</p>	<p><b>Reviewed by:</b> skc</p>
<p><input type="checkbox"/> <b>Inventory</b></p>	<p>Petitioner states that according to the provisions of the trust, if Angela Ruelas chooses not to live in the home, it reverts back to trust property and is under the exclusive control of the trustees to determine the appropriate resolution regarding the property. Co-Trustee Jesse Ruelas' position is that Angela has the right to have anyone in the property she wishes during her life estate, even if she is not living in the home. This causes Petitioner concern regarding his motives, since the person living in the home is his daughter. She is receiving a great benefit from living in the home at the expense of all the beneficiaries.</p>	<p><b>Reviewed on:</b> 1/7/16</p>
<p><input type="checkbox"/> <b>PTC</b></p>	<p><b>Therefore, Petitioner requests instructions regarding the life estate of Angela Ruelas.</b> Considering her non-compliance with the provision indicating that she must live in the home to ratify the life estate, Petitioner is requesting the Court instruct the 61 N. DeWitt property to revert back to trust property to be under the exclusive control of the Co-Trustees.</p>	<p><b>Updates:</b></p>
<p><input type="checkbox"/> <b>Not.Cred.</b></p>	<p><b>SEE ADDITIONAL PAGES</b></p>	<p><b>Recommendation:</b></p>
<p><input checked="" type="checkbox"/> <b>Notice of Hrg</b></p>		<p><b>File 13A - Ruelas</b></p>
<p><input checked="" type="checkbox"/> <b>Aff.Mail</b> <span style="float:right">W</span></p>		
<p><input type="checkbox"/> <b>Aff.Pub.</b></p>		
<p><input type="checkbox"/> <b>Sp.Ntc.</b></p>		
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<p><input type="checkbox"/> <b>Duties/Supp</b></p>		
<p><input type="checkbox"/> <b>Objections</b></p>		
<p><input type="checkbox"/> <b>Video Receipt</b></p>		
<p><input type="checkbox"/> <b>CI Report</b></p>		
<p><input type="checkbox"/> <b>9202</b></p>		
<p><input type="checkbox"/> <b>Order</b> <span style="float:right">X</span></p>		
<p><input type="checkbox"/> <b>Aff. Posting</b></p>		
<p><input type="checkbox"/> <b>Status Rpt</b></p>		
<p><input type="checkbox"/> <b>UCCJEA</b></p>		
<p><input type="checkbox"/> <b>Citation</b></p>		
<p><input type="checkbox"/> <b>FTB Notice</b></p>		

## Page 2

**Jesse Joe Ruelas, Co-Trustee, filed Answer and Objections on 11-14-14.** Mr. Ruelas denies that he has not been abiding by the provisions of the trust and denies that he has been making decisions without Petitioner's approval or knowledge. The only dispute concerns the life estate. Respondent believes it was his parents' wishes that their youngest daughter, Angela Ruelas, was to be given a life estate in the property and is entitled to possession of the property. Petitioner disagrees.

Respondent states that the fact that he disagrees with Petitioner on this matter is not a reason to remove him as co-trustee. Respondent is concerned that if he is removed, Petitioner will ignore the terms of the trust. Petitioner wanted her son Matthew to have the home, and was upset when their mother asked Matthew to move out. Respondent states Petitioner is also upset that the home was left to Angela and Angela has not agreed to give or rent the home to Matthew.

Respondent states the only assets of the trust that he is aware of are the home and personal property at the home. There is a separate property in Ensenada being overseen by Petitioner; however, Respondent doesn't know if it is part of the trust.

Respondent states Angela has stated that she intends to return to live in the property and believes that she has been moving items into the home. Respondent is informed that Angela has allowed Christina Ruelas and her child to also reside at the home, and they have use of two bedrooms, and the others are for Angela.

Respondent believes the Court should determine the meaning of the trust terms, and this issue about Angela Ruelas' life estate in the property. Respondent denies that he has any hostility or has refused to cooperate with Petitioner as his co-trustee, and states he is not being guided in his actions by the fact that Christina is his daughter. Respondent believes Angela is entitled to the home, and Petitioner wants her out of the home so that she can rent it to her son.

**See Answer for additional information. See also Points and Authorities filed concurrently. Respondent prays:**

1. That the Court instruct the parties as to what, if anything, Angela Ruelas needs to do to obtain the life estate in the home and property at 61 N. DeWitt;
2. That the Court instruct the parties that Angela Ruelas has been granted a life estate in the home and property at 61 N. DeWitt;
3. That the Court declare that Angela Ruelas' life estate has not terminated;
4. That the court deny Petitioner's demand that Jesse J. Ruelas be removed as a co-trustee of the trust;
5. That Jesse J. Ruelas be reimbursed his costs and attorney fees for responding to this petition and motion; and
6. For such other relief as the Court deems just.

**Angela Ruelas also filed an Answer and Objection on 11-18-14.**

**SEE ADDITIONAL PAGES**

## Page 3

Angela Ruelas states she does want to live in the home and has moving clothes and possessions into the home and purchasing furniture for the home. She agreed to sublet a portion of the home to a relative, Christina, and her child, in return for Christina contributing to pay the costs of keeping up the house, taxes, etc. Angela states she is keeping the other two bedrooms for her use alone and intends to live in the home while Christina also resides there.

Angela Ruelas states she has already done all that she needs to do to "secure" her life interest in the home and the life interest was granted to her without any conditions precedent that she had to meet before she is given the life estate. It is her understanding that the life estate continues until she dies or chooses not to live there. Neither of these conditions has occurred. Angela requests the Court say what must be done so that she can do it.

Angela Ruelas states she has tried to pay for instucance, gardener, property taxes, and other costs associated with the home, but Petitioner has interfered and made it impossible for her to pay costs directly. For example, the gardener refused to take the payment, stating that Petitioner told him not to take payments from Angela Ruelas. She has also tried to reimburse the trust for various costs and expenses, but Petitioner has refused to cash the check. She has been able to pay utilities and home warranty, and remains ready and willing to pay the other expenses, if Petitioner were not preventing it. Various authority cited.

Angela Ruelas further states that Petitioner entered the home and removed property that was supposed to stay with the home, including furniture, and requests that Petitioner return specific items.

**Angela Ruelas prays:**

1. That the Court deny Petitioner's request that the court find that her life estate in the property is terminated;
2. That the Court give instructions and declare that she has a life estate in the home and that there were no conditions precedent to her obtaining the life estate;
3. That if the court finds that there are conditions precedent to her obtaining the life estate, that the court give instructions as to what, if anything, she needs to do to obtain the life estate, and give time to meet those conditions;
4. That the Court deny Petitioner's request that the court find that the life estate is terminated;
5. That the Court find that she has not terminated her life estate in the property;
6. That the Court order Petitioner to return the taken property to the home;
7. That the Court deny Petitioner's request to remove Jesse Ruelas as co-trustee;
8. That the Court award Angela Ruelas recovery of her attorney fees and costs of suit;
9. That the Court grant such other relief as is just.

**Declaration of Irma Hicks Regarding Recent Events Surrounding the Trust was filed 1-23-15.** See declaration for details.

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**NEEDS/PROBLEMS/COMMENTS:**

1. **The petition does not state the names and addresses of each person entitled to notice of this petition, which includes Petitioner, pursuant to Probate Code §17201. Need verified declaration with this information.**
2. **It is unclear if Christina is currently residing in the home at this time. The Court may require 30 days' notice to Christina Ruelas pursuant to Probate Code §17203(c) or other applicable law.**
3. **Need order pursuant to Local Rule 7.1.1.F.**

**13B Octavio & Mary Ruelas 2001 Family Trust**

Case No. 14CEPR00929

Atty Walters, Jennifer L. (for Irma Hicks – Co-Trustee – Petitioner)

Atty Donohue, Francis T, III, (of Newport Beach, CA, for Jesse Joe Ruelas – Co-Trustee – Objector)

Atty Ruelas, Angela (Pro Per – Beneficiary – Objector)

Probate Status Hearing RE: Resolution

Cont. from 092915, 111015		<p><b>IRMA HICKS</b>, a Co-Trustee of the Octavio and Mary Ruelas Family Trust, filed <b>Petition for Instructions Regarding Life Estate of Angela Ruelas and Removal of Co-Trustee of The Octavio and Mary Ruelas Family Trust.</b></p> <p>On 8/11/15, counsel indicated that the parties had reached an agreement. The Court set this status hearing re resolution.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 11/10/15:</b> Counsel represent that all parties have signed the agreement and a request for dismissal of the petition is forthcoming. The matter will come off calendar on 1/12/16 if the dismissal is filed and granted.</p> <p><b>Update:</b> Declaration of Jennifer Walters filed 1/5/16 provides the signed settlement agreement; however, no Request for Dismissal has been filed.</p>
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<p><b>Reviewed on:</b> 1/7/16</p>	
		<p><b>Updates:</b></p>	
		<p><b>Recommendation:</b></p>	
		<p><b>File 13B – Ruelas</b></p>	

13B

**Probate Status Hearing RE: Additional Insurance Monies**

	<b>LOIDA AURORA IN</b> , Mother, was appointed Guardian of the Estate on 8/11/15 without bond, with all funds placed into a blocked account. Letters issued 8/13/15.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Need receipt for deposit(s) of additional insurance monies into blocked account or written status report pursuant to Local Rule 7.5.</b></p>
	The Court set a status hearing for the filing of the receipt for blocked account.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>	<b>See status Report filed 11/9/15.</b>	
<b>PTC</b>		
<b>Not.Cred.</b>	<b>Minute Order 11/10/15</b> set this status hearing re receipt of additional insurance monies.	
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 1/7/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 17A- In</b>



**Petition (1) for Removal of Trustee; (2) for Damages for Breach of Trust; (3) to Compel Trust Accounting; and (4) Objection to Accounting (Prob. Code §§ 17200, 16063)**

John F. Murray DOD: 12/17/03		<p><b>MARY MURRAY</b>, Beneficiary, is Petitioner.</p> <p><b>Petitioner states</b> Settlor John F. Murray executed the trust on 5/26/00 and amended one time on 6/19/02. The trust designated Settlor and <b>DALE MURRAY SULLIVAN</b> to act as co-trustees. Settlor died 12/17/03 and since his death, Dale Murray Sullivan has acted as sole trustee.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Minute Order 10/27/15</u>: Mr. Willoughby is just coming in on this matter; parties request a continuance.</p> <p><b>Note:</b> As of 1/7/16, nothing further has been filed.</p>	
Cont'd from: 102715				
<input type="checkbox"/>	Aff.Sub.Wit.	<p>Petitioner states in December 2005, the trustee sent a letter to beneficiaries outlining expenses, transactions and income of the trust estate. Petitioner alleges the letter is not a legally sufficient account of trust activities and fails to contain information required by Probate Code §16063. Petitioner object to the account and also objects to the fees claimed by the trustee of \$15,000. Petitioner states the account fails to justify the fees and the fees are excessive and should be disallowed.</p> <p>Exhibit D states the trustee is retaining a reserve of \$55,540,85 for legal fees and final estate tax payments, and states the trust will have additional projected income of \$15,000 for the Palm Canyon Closing Payment, and will also have continuing income of \$4,200/yr. However, despite these statements, there have been no payments to the beneficiaries since December 2005, almost 10 years ago.</p> <p>Based on the reserve, the expected payment, and projected income over the last 10 years, the trustee is believed to have retained and spent trust money of \$112,000 or more.</p> <p style="text-align: center;"><u><b>SEE PAGE 2</b></u></p>	<p><b>1. Petitioner states Fresno County is the proper venue pursuant to Probate Code §16061.7 with reference to Exhibit C, a copy of the notice provided by the trustee in 2004 listing the trustee's address in Fresno.</b></p> <p><b>However, Exhibit D, an expense itemization provided by the trustee in 2005, indicates an address in Sioux Falls, South Dakota, and Petitioner provides a current address for the trustee in San Antonio, Texas.</b></p> <p><b>Therefore, need clarification as to why Fresno County is proper venue pursuant to Probate Code §§ 17002, 17005.</b></p> <p><b>2. The Court may require further authority as to why §17200(b)(7) should not apply. It appears Petitioner has not had contact with the trustee for 10 years and has not made formal written request to the trustee for the information requested; therefore this petition may be filed prematurely.</b></p>	
<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			
<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: 1/7/16		
		Updates:		
		Recommendation:		
		File 19 – Murray		

**Page 2**

**Petitioner alleges** that the requirements of Probate Code §17200(b)(7) of a written request, a 60-day wait, and lack of account within the precedent six months should not apply when a breach of trust may have occurred, especially when more than \$100,000 has disappeared without explanation.

Petitioner states she has received and is in possession of a check dated 7/15/15 from HMS-Palm Springs in the sum of \$39,600 made out to John F. Murray. Petitioner has been unsuccessful in contacting HMS-Palm Springs to determine the reason for the check and/or to find out what other payments have been made since the death of the settlor.

**Petitioner prays for an order:**

- 1. Instructing Dale Murray Sullivan to prepare and file with this court an account for the John F. Murray Living Trust from the date of death, or alternatively, should the Court find Exhibit D to be a legally sufficient account, from the end date of Exhibit D;**
- 2. Instructing Dale Murray Sullivan to petition this court for settlement of the account;**
- 3. Removing Dale Murray Sullivan as trustee;**
- 4. Finding that Dale Murray Sullivan as trustee has breached the trust and that she is liable for all resulting damages;**
- 5. Sustaining Petitioner's objections to the account;**
- 6. Surcharging the trustee for damages and for all improper payments; and**
- 7. For any additional orders the court deems appropriate.**

Petitioner: Herbert Fields (pro per)

Petition for Appointment of Guardian of the Person

		<b>TEMPORARY EXPIRES 1/12/16</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>HERBERT FIELDS</b> , paternal cousin, is petitioner.	<b>Continued form 11/10/15 as of 1/7/16 the following issues remain:</b>
<b>Cont. from 111015</b>			1. Need Notice of Hearing.
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	Please see petition for details.	2. Need proof of personal service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice or declaration of due diligence on: a. L.C. Moore (father) b. Lacey Macu (mother)
<input type="checkbox"/>	<b>Inventory</b>	<b>Court Investigator report filed on 1/6/16</b>	
<input type="checkbox"/>	<b>PTC</b>		3. Need proof of service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice or declaration of due diligence on: c. Maternal grandparents.
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	X	
<input type="checkbox"/>	<b>Aff.Mail</b>	X	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	X	
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input checked="" type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> KT
			<b>Reviewed on:</b> 1/7/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 21 – Moore</b>

Petitioner Ricardo Cabrera (Pro Per)  
 Petitioner Bonni Cabrera (Pro Per)

Petition for Appointment of Guardian of the Person

		<p><b>TEMPORARY EXPIRES 11/10/2015; extended to 1/12/2016 as to BONNI CABRERA ONLY</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
		<p><b>BONNI CABRERA</b>, half-sister, and <b>RICARDO CABRERA</b>, spouse of half-sister, are Petitioners.</p>	<p>1. Need proof of personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i>, for:</p> <ul style="list-style-type: none"> <li>Anita Martin Brown, mother; (service by mail is insufficient);</li> </ul>
<p>Cont. from 111015</p>			
	Aff.Sub.Wit.	<p style="text-align: center;">~Please see Petition for details~</p> <p>Court Investigator's Report was filed on 11/3/2015.</p>	<p>2. UCCJEA filed 9/9/2015 does not provide minor's residence information for the past 5 years as required.</p>
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail <sup>W</sup> / <sub>I</sub>		
	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		
			<p><b>Reviewed by:</b> LEG</p>
			<p><b>Reviewed on:</b> 1/7/16</p>
			<p><b>Updates:</b></p>
			<p><b>Recommendation:</b></p>
			<p><b>File 22 – Martin &amp; Brown</b></p>

Petitioner Drhew Yang Ngialah (Pro Per)

Petition for Letters of Administration

<b>DOD: 5/18/2015</b>	<b>DRHEW YANG NGIALAH</b> , niece, is Petitioner and requests appointment as Administrator ( <i>Bond is not addressed.</i> )	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 11/10/2015.</b> Minute Order states examiner notes provided in open court.</p> <p><b>The following issues from the last hearing remain:</b></p> <ol style="list-style-type: none"> <li>Item 3(c) of the <i>Petition</i> states the character and estimated value of the property of the estate is personal property valued at <b>\$2,000.00</b>. It appears Petitioner may not need to initiate the instant probate proceeding to have the Decedent's property distributed, if this is an accurate description of the character and value of Decedent's estate property. Probate Code §§ 13100 to 13116 provide an affidavit procedure whereby property such as that described by the Petitioner can be transferred. A blank <i>Declaration for Transfer of Personal Property without Probate</i> form is in the case file for Petitioner's reference and potential use to distribute the Decedent's property.</li> <li>Petition is significantly defective in several aspects and has not been reviewed based upon the issue raised in Item 1, above.</li> </ol>
<b>Cont. from 111015</b>	Full IAEA — ?	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>	Decedent died intestate.	
<input type="checkbox"/> <b>Inventory</b>		
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	Residence — Fresno	
<input type="checkbox"/> <b>Notice of Hrg</b>	Publication — <b>Need</b>	
<input type="checkbox"/> <b>Aff.Mail</b>	<b>Estimated value of the Estate:</b>	
<input type="checkbox"/> <b>Aff.Pub.</b>	Personal property - <b>\$2,000.00</b>	
<input type="checkbox"/> <b>Sp.Ntc.</b>	_____	
<input type="checkbox"/> <b>Pers.Serv.</b>	<b>Total</b> _____ - <b>\$2,000.00</b>	
<input type="checkbox"/> <b>Conf. Screen</b>		
<input type="checkbox"/> <b>Letters</b>	Probate Referee: <b>Rick Smith</b>	
<input type="checkbox"/> <b>Duties/Supp</b>		
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>		
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed on:</b> 1/7/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 23 - Yang</b>