



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.

Petition for Appointment of Guardian of the Person

Age: 12	<u>TEMPORARY EXPIRES 01/12/16</u>	NEEDS/PROBLEMS/COMMENTS:
	BRENDA KAY PERRY , non-relative, is Petitioner.	<u>CONTINUED FROM 11/17/15</u>
	Father: BRUCE BURLESON – personally served on 10/09/15	
Cont. from 100515, 111715	Mother: CONNIE AMADOR – deceased	
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandfather: JIM BURLESON served by mail on 11/30/15	
<input checked="" type="checkbox"/> Verified	Paternal grandmother: CHARLOTTE BURLESON – served by mail on 11/30/15	
<input type="checkbox"/> Inventory	Maternal grandfather: HENRY AMADOR - deceased	
<input type="checkbox"/> PTC	Maternal grandmother: RACHEL MCCOLLUM – Consent & Waiver of Notice filed 08/13/15	
<input type="checkbox"/> Not.Cred.	Petitioner states: [see file].	
<input checked="" type="checkbox"/> Notice of Hrg	DSS Social Worker Irma Ramirez filed a report on 10/02/15.	
<input checked="" type="checkbox"/> Aff.Mail w/		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv. w/		
<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 type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: JF
<input type="checkbox"/> Status Rpt		Reviewed on: 01/08/16
<input checked="" type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 1 – Burleson

Probate Status Hearing RE: Next Account

	JEFFREY H. DALE , Spouse, is Successor Conservator of the Estate with bond of \$340,000.00.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 11/10/1511/10/15:</u> Continued to meet up with the Demurrer and Motion to Strike set for 1/12/16 (McLain Trust 11CEPR00028). Note: Attorney Gordon Panzak is Conservator of the Person. 1. Need Fourth Account or written status report pursuant to Local Rule 7.5.
	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.	
Cont. from 093015, 111015		
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: 1/7/15
		Updates:
		Recommendation:
		File 2 – Dale

Probate Status Hearing RE: Petition Filed 4/6/11

DOD: 5-21-08	<p>DEBBIE DUEHNING, as Guardian ad Litem for GEORGE MCLAIN, IV, filed the following petitions:</p> <ul style="list-style-type: none"> • Petition for Order Compelling Trustee to Make Distribution to Trust Beneficiary; for Imposition of a Constructive Trust; and for an Accounting (filed 4/6/11) • Petition to Review Reasonableness of Trustees Compensation, Reasonableness of Attorney’s Fees and Costs; for an Accounting and for Removal of the Trustee (filed 8/25/11) <p>On 2/13/15, JEFF DALE, Successor Trustee, filed a Motion to Dismiss various petitions.</p> <p>On 3/30/15, DEBBIE DUEHNING filed a Motion to Amend Petition.</p> <p>Pursuant to the Court’s Order on 1) Motion to Dismiss; and 2) Motion for Leave to Amend Petition entered 9/29/15, Mr. Dale’s Motion to Dismiss was denied, and Ms. Duehning’s Motion for Leave to Amend was granted, and Ms. Duehning was ordered to file and serve her amended petition.</p> <p>The Order also set status hearings re the 4/6/11 Petition and the 8/25/11 Petition.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 11/10/15</u>: Continued to meet up with the Demurrer and Motion to Strike.</p> <p><u>Note</u>: On 9/30/15, Ms. Duehning filed Conservator’s Second Amended Petition for Orders: 1) Compelling Trustee to Make Distribution to Trust Beneficiary; 2) for Damages for Breach of Trust/Fiduciary Duties; 3) for Damages for Fraud/Concealment; 4) for Recovery of Trust Property/Quiet Title; 5) for Recovery of Trust Assets; 6) Compelling Trustee to Perform and Accounting; 7) for Removal of Trustee; 8) for Cancellation of Deeds, which was set for 11/18/15.</p> <p>On 11/9/15, Jeffrey Dale, Gordon Panzak, and Dalpar Investments, LLC, filed Notice of Demurrer and Demurrer to the Second Amended Petition, which was set for 1/12/16.</p> <p>On 11/18/15, the Second Amended Petition was continued to 1/12/16.</p>
Cont’d from 111015		
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		
	<p>Reviewed by: skc</p> <p>Reviewed on: 1/8/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3A - Mclain</p>	

Probate Status Hearing RE: Petition Filed 8/25/11

DOD: 5-21-08	<p>DEBBIE DUEHNING, as Guardian ad Litem for GEORGE MCLAIN, IV, filed the following petitions:</p> <ul style="list-style-type: none"> • Petition for Order Compelling Trustee to Make Distribution to Trust Beneficiary; for Imposition of a Constructive Trust; and for an Accounting (filed 4/6/11) • Petition to Review Reasonableness of Trustees Compensation, Reasonableness of Attorney's Fees and Costs; for an Accounting and for Removal of the Trustee (filed 8/25/11) <p>On 2/13/15, JEFF DALE, Successor Trustee, filed a Motion to Dismiss various petitions.</p> <p>On 3/30/15, DEBBIE DUEHNING filed a Motion to Amend Petition.</p> <p>Pursuant to the Court's Order on 1) Motion to Dismiss; and 2) Motion for Leave to Amend Petition entered 9/29/15, Mr. Dale's Motion to Dismiss was denied, and Ms. Duehning's Motion for Leave to Amend was granted, and Ms. Duehning was ordered to file and serve her amended petition.</p> <p>The Order also set status hearings re the 4/6/11 Petition and the 8/25/11 Petition.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 11/10/15</u>: Continued to meet up with the Demurrer and Motion to Strike.</p> <p><u>Note</u>: On 9/30/15, Ms. Duehning filed Conservator's Second Amended Petition for Orders: 1) Compelling Trustee to Make Distribution to Trust Beneficiary; 2) for Damages for Breach of Trust/Fiduciary Duties; 3) for Damages for Fraud/Concealment; 4) for Recovery of Trust Property/Quiet Title; 5) for Recovery of Trust Assets; 6) Compelling Trustee to Perform and Accounting; 7) for Removal of Trustee; 8) for Cancellation of Deeds, which was set for 11/18/15.</p> <p>On 11/9/15, Jeffrey Dale, Gordon Panzak, and Dalpar Investments, LLC, filed Notice of Demurrer and Demurrer to the Second Amended Petition, which was set for 1/12/16.</p> <p>On 11/18/15, the Second Amended Petition was continued to 1/12/16.</p>
Cont'd from 111015		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
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Notice of Hrg		
Aff.Mail		
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Sp.Ntc.		
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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: 1/8/16		
Updates:		
Recommendation:		
File 3B – McClain		

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

		PERINE & DICKEN , Trustee, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</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>
		Account period: 7/1/2014 – 6/30/2015	
		Accounting - \$605,519.45	
		Beginning POH - \$555,101.64	
		Ending POH - \$563,782.90 (\$49,397.83 is cash)	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Trustee - \$5,743.75 (paid) <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"/>	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.	Attorney - \$3,249.00 <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"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	Costs - \$331.00 <i>(filing fee, runner service and court call)</i>	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Bond - \$646,000.00 <i>(Petitioner requests reduced bond of \$643,000.00;)</i>	
<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: KT	
		Reviewed on: 1/7/16	
		Updates:	
		Recommendation:	
		File 4- Davis-Maynard	

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**;

Attorney Bagdasarian, Gary G. (for Linda Plitt – daughter)
 Attorney Barkinskaya, Jennie and Farley, Michael (for Conservatee)
 Objector Loeffler, Mick (pro per – son)
 Attorney Downing, Marcella and McLaughlin, William T. (for Diane Huerta – daughter/Petitioner)
 Attorney Johnson, Summer A (for Bruce Bickel – temporary conservator of the estate/trustee)

Probate Status Hearing RE: Temporary Orders/Letters

	The Current Letters of Temporary Conservatorship expire on 01/12/16	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 12/08/15</u> Minute Order from 12/08/15 states: Counsel reports that Mr. Bickel is finishing with transitioning the Conservatorship accounts to the Trust; there is no appearance by Mick Loeffler, who is the only one that has not agreed to a private fiduciary.</p> <p>1. Need updated status report.</p> <p>Note: Michael Farley and Jennie Barkinskaya filed a Motion to Relieved as Counsel that is set for hearing on 02/10/16.</p> <p>Reviewed by: JF</p> <p>Reviewed on: 01/08/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 - Loeffler</p>
	On 07/26/13, DIANE HUERTA , daughter, filed a Petition to appoint Diane Huerta and Linda Plitt as temporary and permanent co-conservators of the Person and Estate.	
	Temporary Conservatorship was granted on 07/29/13 and Temporary Letters were issued on 07/30/13. At a hearing on 08/19/13, the temporary Conservatorship was denied and Temporary Letters were not extended. On 09/25/13, Judge Black appointed Bruce Bickel as Temporary Conservator of the Estates of Fred and Kathleen Loeffler.	
	Since 09/25/13, the parties have engaged in numerous settlement talks, mediation, and several hearings have been heard before this Court. The Temporary Letters of Conservatorship have been extended numerous times.	
Cont. from 061615, 091515, 120815	Order Approving Second and Final Account of Temporary Conservator of the Estate was filed 11/13/15. The Order authorized and directed Bruce Bickel, temporary conservator, to transfer the assets of the conservatorship estate to Comerica Bank & Trust, N.A., successor trustee of the Loeffler Family Trust.	
Aff.Sub.Wit.	Status Report of Petitioner Diane Huerta filed 12/04/15 states: After an extensive search for an appropriate neutral party to serve as healthcare representative for Dr./Mrs. Loeffler, Ms. Austin of Central Valley Fiduciary Services was proposed and the Loeffler's stated they were amenable to Ms. Austin serving in that capacity. Draft health care directives naming Ms. Austin are being drafted, but to Petitioner's knowledge have not been completed. Because the conservatorship is an integral part of this agreement and the advance healthcare directive must be in place for the agreement to provide the protections necessary, it is Petitioner's position that the conservatorship must remain in place until the health care directives have been finalized.	
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		

Attorney Bagdasarian, Gary G. (for Linda Plitt – daughter)
 Attorney Barkinskaya, Jennie and Farley, Michael (for Conservatee)
 Objector Loeffler, Mick (pro per – son)
 Attorney Downing, Marcella and McLaughlin, William T. (for Diane Huerta – daughter/Petitioner)
 Attorney Johnson, Summer A (for Bruce Bickel – temporary conservator of the estate/trustee)

Probate Status Hearing RE: Temporary Orders/Letters

	The Current Letters of Temporary Conservatorship expire on 01/12/16.	NEEDS/PROBLEMS/COMMENTS:
	On 07/26/13, DIANE HUERTA , daughter, filed a Petition to appoint Diane Huerta and Linda Plitt as temporary and permanent co-conservators of the Person and Estate.	
Cont. from 061615, 091515, 120815	Temporary Conservatorship was granted on 07/29/13 and Temporary Letters were issued on 07/30/13. At a hearing on 08/19/13, the temporary Conservatorship was denied and Temporary Letters were not extended. On 09/25/13, Judge Black appointed Bruce Bickel as Temporary Conservator of the Estates of Fred and Kathleen Loeffler.	<u>CONTINUED FROM 12/08/15</u>
Aff.Sub.Wit.		Minute Order from 12/08/15 states:
Verified		Counsel reports that Mr. Bickel is finishing with transitioning the Conservatorship accounts to the Trust; there is no appearance by Mick Loeffler, who is the only one that has not agreed to a private fiduciary.
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Since 09/25/13, the parties have engaged in numerous settlement talks, mediation, and several hearings have been heard before this court in this matter and the Temporary Letters of Conservatorship have been extended numerous times.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Order Approving Second and Final Account of Temporary Conservator of the Estate was filed 11/13/15. The Order authorized and directed Bruce Bickel, temporary conservator, to transfer the assets of the conservatorship estate to Comerica Bank & Trust, N.A., successor trustee of the Loeffler Family Trust.	2. Need updated status report.
Letters		
Duties/Supp		
Objections		
Video Receipt	Status Report of Petitioner Diane Huerta filed 12/04/15 states: After an extensive search for an appropriate neutral party to serve as healthcare representative for Dr./Mrs. Loeffler, Ms. Austin of Central Valley Fiduciary Services was proposed and the Loeffler's stated they were amenable to Ms. Austin serving in that capacity. Draft health care directives naming Ms. Austin are being drafted, but to Petitioner's knowledge have not been completed. Because the conservatorship is an integral part of this agreement and the advance healthcare directive must be in place for the agreement to provide the protections necessary, it is Petitioner's position that the conservatorship must remain in place until the health care directives have been finalized.	Note: Michael Farley and Jennie Barkinskaya filed a Motion to Relieved as Counsel that is set for hearing on 02/10/16.
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 01/08/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 6 - Loeffler

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

DOD: 07/13/2013	<p>PAMELA STRONG, spouse, was appointed Executor with limited IAEA authority without bond on 09/16/2013. Letters issued on 09/14/2013.</p> <p>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.</p> <p>Minute Order of 03/24/2015 set this status hearing for the filing of the First and Final Account.</p> <p>Status Report Regarding Failure to File Final Account filed 10/23/2015 by the Public Administrator 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:</p> <ul style="list-style-type: none"> Assets of the estate on the Partial No.: 1 Inventory and Appraisement filed 03/14/2014 listed \$40,000.00 cash, but there is no indication where it was held. The Final Inventory and Appraisement filed 03/19/2014 lists real property at 774 E. Wood Duck Circle, Fresno, Ca. 93730. This real property was valued by the Probate Referee at \$315, 000.00. The property was held as Richard C. Strong and Pamela J. Strong, Husband and Wife, Community Property on the Deed of Trust recorded 12/28/2006 as instrument no. 2006-0270999. <p>Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 7B is a Confidential Fee Waiver Hearing.</p> <p><u>OFF CALENDAR.</u></p> <p><u>Report of Insolvent Estate and Request for Discharge of Public Administrator filed 12/30/2015. Hearing set for 02/17/2016.</u></p> <p>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.</p> <p>1. Need Final Account.</p>
Cont. from 072815, 110315		
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		
	<p>Reviewed by: LV</p> <p>Reviewed on: 01/07/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7A – Strong</p>	

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

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

7B

Attorney Bagdasarian, Gary G. (for Linda Plitt – daughter)
 Attorney Barkinskaya, Jennie and Farley, Michael (for Conservatee)
 Objector Loeffler, Mick (pro per – son)
 Attorney Downing, Marcella and McLaughlin, William T. (for Diane Huerta – daughter/Petitioner)
 Attorney Johnson, Summer A (for Bruce Bickel – temporary conservator of the estate/trustee)

Probate Status Hearing

	On 08/19/13, DIANE HUERTA , daughter of Trustor's Fred and Kathleen Loeffler, filed a Petition to Determine the Validity of the Trust Modifying the Trust, Removing Trustees, Appointing Trustees, Instructing the Trustee, Compelling Redress of Breach of Trust, and Preliminary Injunction and Prohibition of Further Distributions to Mick Loeffler.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 061615, 091515, 120815		
Aff.Sub.Wit.	Since 08/19/13, the parties have engaged in numerous settlement talks, mediation, and several hearings have been heard before this court.	<u>CONTINUED FROM 12/08/15</u> Minute Order from 12/08/15 states: Counsel reports that Mr. Bickel is finishing with transitioning the Conservatorship accounts to the Trust; there is no appearance by Mick Loeffler, who is the only one that has not agreed to a private fiduciary.
Verified		
Inventory	On 04/28/15, Diane Huerta, filed a Notice of Motion and Motion to Disqualify Conservatees' Attorneys of Record. The matter was heard on 06/10/15 and the took the matter under submission.	3. Need updated status report.
PTC		
Not.Cred.	Order After Hearing on Petition to Disqualify Conservatee's Counsel of Record denying the motion was filed 09/04/15.	Note: Michael Farley and Jennie Barkinskaya filed a Motion to Relieved as Counsel that is set for hearing on 02/10/16.
Notice of Hrg		
Aff.Mail	Order Approving Second and Final Account of Temporary Conservator of the Estate was filed 11/13/15. The Order authorized and directed Bruce Bickel, temporary conservator, to transfer the assets of the conservatorship estate to Comerica Bank & Trust, N.A., successor trustee of the Loeffler Family Trust.	Reviewed by: JF
Aff.Pub.		
Sp.Ntc.	Status Report of Petitioner Diane Huerta filed 12/04/15 states: After an extensive search for an appropriate neutral party to serve as healthcare representative for Dr./Mrs. Loeffler, Ms. Austin of Central Valley Fiduciary Services was proposed and the Loeffler's stated they were amenable to Ms. Austin serving in that capacity. Draft health care directives naming Ms. Austin are being drafted, but to Petitioner's knowledge have not been completed. Because the conservatorship is an integral part of this agreement and the advance healthcare directive must be in place for the agreement to provide the protections necessary, it is Petitioner's position that the conservatorship must remain in place until the health care directives have been finalized.	Reviewed on: 01/08/16
Pers.Serv.		Updates:
Conf. Screen		Recommendation:
Letters		File 8 - Loeffler
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

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

		CYNTHIA PIOMBINO , paternal grandmother and Co-Guardian, is Petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 11/10/2015. 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>
		CYNTHIA PIOMBINO , paternal grandmother, and GEORGE JAURIQUE , paternal grandfather, were appointed Co-Guardians on 11/14/2013.	
Cont. from 111015			
	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	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: LEG</p> <p>Reviewed on: 1/7/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9 - Jaurique</p>

~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.

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>NEEDS/PROBLEMS/ COMMENTS:</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

DOD: 3/21/2014	<p>JUAN CARLOS VALENCIA, JR., son, was appointed Executor with Full IAEA authority without bond on 7/7/2014.</p> <p>Letters issued on 7/10/2014.</p> <p>Pursuant to Probate Code § 8800(b), Final Inventory and Appraisal was filed 7/22/2014 showing an estate value of \$200,000.00.</p> <p>Pursuant to Probate Code § 12200, first account and/or petition for final distribution was due 7/10/2015.</p> <p>Minute Order dated 7/7/2014 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.</p> <p>Declaration of James J. Mele Re Status filed on 12/23/2015 states:</p> <ul style="list-style-type: none"> • The sole asset of the estate was real property that has been sold for \$170,000.00; • Terms were \$150,000.00 cash and a note for \$20,000.00, payable monthly for 2 years until April 2017, pursuant to Notice of Proposed Action; • 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; • 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; • Further, there were substantial Medi-Cal liens filed in this matter; those liens have recently been satisfied and Satisfactions have just been received; • It is respectfully requested that this matter be continued an additional 120 days to allow for resolution or foreclosure of the Note Secured by Deed of Trust. 	NEEDS/PROBLEMS/COMMENTS:
		Continued from 9/8/2015. Minute Order states counsel requests 120 days.
Cont. from 090815		
<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 type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input checked="" type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LEG
		Reviewed on: 1/7/16
		Updates:
		Recommendation:
		File 11 – Ledesma

Octavio Ruelas DOD: 6-7-06	IRMA HICKS , a Co-Trustee of the Octavio and Mary Ruelas Family Trust, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Mary Ruelas DOD: 6-11-14	Petitioner states she and JESSE JOE RUELAS 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.	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.
Cont from 120114, 012615, 081115, 092915, 111015	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.	Update: Declaration of Jennifer Walters filed 1/5/16 provides the signed settlement agreement; however, no Request for Dismissal has been filed.
<input type="checkbox"/> Aff.Sub.Wit.	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.	The following items remain noted for reference: SEE LAST PAGE.
<input checked="" type="checkbox"/> Verified	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.	Reviewed by: skc
<input type="checkbox"/> Inventory	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.	Reviewed on: 1/7/16
<input type="checkbox"/> PTC	Therefore, Petitioner requests instructions regarding the life estate of Angela Ruelas. 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.	Updates:
<input type="checkbox"/> Not.Cred.	SEE ADDITIONAL PAGES	Recommendation:
<input checked="" type="checkbox"/> Notice of Hrg		File 13A - Ruelas
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input checked="" type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

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.

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>IRMA HICKS, a Co-Trustee of the Octavio and Mary Ruelas Family Trust, filed Petition for Instructions Regarding Life Estate of Angela Ruelas and Removal of Co-Trustee of The Octavio and Mary Ruelas Family Trust.</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>NEEDS/PROBLEMS/COMMENTS:</p> <p>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.</p> <p>Update: Declaration of Jennifer Walters filed 1/5/16 provides the signed settlement agreement; however, no Request for Dismissal has been filed.</p>
Aff.Sub.Wit.			
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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			
		<p>Reviewed on: 1/7/16</p>	
		<p>Updates:</p>	
		<p>Recommendation:</p>	
		<p>File 13B – Ruelas</p>	

15 Isaiah Cervantes, Ilene Cervantes (GUARD/P) Case No. 15CEPR00587

Petitioner Aguilar, Maria D (Pro Per – Mother)

Objector Aguilar, Maria D (Pro Per – Co-Guardian)

Objector Lucero, Dora A (Pro Per – Co-Guardian)

Petition for Termination of Guardianship

Isaiah, age 10	HEIDI BELINDA LUCERO , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Ilene, age 4	DORA A. LUCERO and MARIA D. AGUILAR , Maternal Grandmother and Great-Aunt, were appointed guardians on 08/10/2015. Objection filed 01/05/2016.	
Cont. from		<ol style="list-style-type: none"> 1. Petition is incomplete. Petitioners do not provide a reason why termination of the guardianship is in the best interest of the minors. 2. Need Notice of Hearing. 3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Dora A. Lucero (Co-Guardian) • Maria D. Aguilar (Co-Guardian) • Luis Cervantes (Father) • Luis Cervantes (Paternal Grandfather) • Maribel Cervantes (Paternal Grandmother) • Guadalupe Lucero (Paternal Grandfather)
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	<u>Please see petition for details</u>	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	x	
Aff.Mail	x	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
<input checked="" type="checkbox"/> CI Report		
9202		
<input checked="" type="checkbox"/> Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 01/07/2016
		Updates:
		Recommendation:
		File 15- Cervantes

16 Priscilla Rosales, Araceli Rosales, Emily Rosales, Serenity Rosales GUARD/P)
Case No. 15CEPR00626

Petitioner Rosales, Rosa Maria (pro per – paternal grandmother/Petitioner)
 Petition for Appointment of Guardian of the Person

Priscilla, 6	<p align="center"><u>NO TEMPORARY REQUESTED</u></p> <p>ROSA ROSALES, paternal grandmother, is Petitioner.</p> <p>Father: MARCO ROSALES – <i>Consent & Waiver of Notice filed 06/25/15</i></p> <p>Mother: TALIA BLODGETT – <i>Personally served on 12/18/15</i></p> <p>Paternal grandfather: ARTURO ROSALES - <i>served by mail on 07/23/15</i></p> <p>Maternal grandfather: MICHAEL BLODGETT - <i>served by mail on 07/23/15</i></p> <p>Maternal grandmother: MISTY BLODGETT – <i>served by mail on 12/16/15</i></p> <p>Petitioner states [see file for details].</p> <p>Court Investigator Dina Calvillo filed a report on 08/19/15.</p> <p>Court Investigator Dina Calvillo filed a report on 10/01/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Petitioner is Spanish speaking.</p> <p><u>CONTINUED FROM 12/01/15</u></p>
Araceli, 5		
Serenity, 3		
Emily, 2		
Cont. from 082515 100615, 120115		
<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 checked="" type="checkbox"/> Pers.Serv. w/		
<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 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: 01/07/16
		Updates:
		Recommendation:
		File 16 – Rosales

Probate Status Hearing RE: Additional Insurance Monies

	<p>LOIDA AURORA IN, 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> <p>The Court set a status hearing for the filing of the receipt for blocked account.</p> <p>See status Report filed 11/9/15.</p> <p>Minute Order 11/10/15 set this status hearing re receipt of additional insurance monies.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need receipt for deposit(s) of additional insurance monies into blocked account 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		
	<p>Reviewed by: skc</p>	
	<p>Reviewed on: 1/7/16</p>	
	<p>Updates:</p>	
	<p>Recommendation:</p>	
	<p>File 17A- In</p>	

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	<p>LOIDA AURORA IN, 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> <p>The Court set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need I&A per Probate Code §2610 or written status report per 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: 1/7/16
		Updates:
		Recommendation:
		File 17B- In

Petitioner Carey, Erica (pro per – half-sister)

Petition for Appointment of Guardian of the Person

Hailey, 9	<u>TEMPORARY EXPIRES 11/10/15</u>		<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p>CONTINUED FROM 11/10/15 Minute Order from 11/10/15 states: Williams Skaggs is personally served a copy of the petition in open court by the Deputy. Mr. Skaggs states his objection for the record. Mr. Skaggs is to go make an appointment with the Court Investigator forthwith and have his written objections filed and served by 12/21/15.</p> <p>As of 01/07/16, no objections has been filed.</p> <ol style="list-style-type: none"> 1. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Ellamae Skaggs (paternal grandmother) – service by mail ok; Proof of service filed 09/28/15 does not indicate that she was served a copy of the Petition along with the Notice of Hearing. b. Bobbi Goddard (maternal grandmother) – service by mail ok; Proof of service filed 09/28/15 does not indicate that she was served a copy of the Petition along with the Notice of Hearing. c. Andrew Skaggs (half-brother) – service by mail ok; unless diligence is found d. Darby Skaggs (half-brother) - service by mail ok; unless diligence is found e. Craig Skaggs (half-brother) - service by mail ok; unless diligence is found
Caitlyn, 9	<p>ERICA CAREY, half-sister, is Petitioner.</p> <p>Father: WILLIAM SKAGGS – Personally served in Court on 11/10/15 by Deputy</p> <p>Mother: MELINDA TURNER – Consent & Waiver of Notice filed 08/13/15; now deceased</p> <p>Paternal grandfather: PHILLIP SKAGGS - deceased</p> <p>Paternal grandmother: ELLAMAE SKAGGS – Served by mail on 09/25/15 with Notice of Hearing only</p> <p>Maternal grandfather: JOHN TURNER - deceased</p> <p>Maternal grandmother: BOBBI GODDARD – Served by mail on 09/25/15 with Notice of Hearing only</p> <p>Siblings: TARYN HOPE (21) – Consent & Waiver of Notice filed 08/13/15, ANDREW SKAGGS, DARBY SKAGGS, CRAIG SKAGGS – Declarations of Due Diligence filed 09/28/15</p> <p>Petitioner states [see Petition for details]</p> <p>Court Investigator Jennifer Young filed a report on 10/07/15.</p> <p>Court Investigator Jennifer Young filed a report on 11/03/15.</p> <p>Declaration filed 10/08/15 by Petitioner Erica Carey.</p> <p>Declaration filed 10/20/15 by Petitioner Erica Carey.</p> <p>Confidential Supplemental Investigator’s Report to Court filed 01/07/16.</p>		
Cont. from 101315, 111015			
<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/o		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input checked="" 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 type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
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<input type="checkbox"/> Aff. Posting			
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<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: JF
			Reviewed on: 01/07/16
			Updates:
			Recommendation:
			File 18 – Turner-Hope

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>MARY MURRAY, Beneficiary, is Petitioner.</p> <p>Petitioner states Settlor John F. Murray executed the trust on 5/26/00 and amended one time on 6/19/02. The trust designated Settlor and DALE MURRAY SULLIVAN to act as co-trustees. Settlor died 12/17/03 and since his death, Dale Murray Sullivan has acted as sole trustee.</p> <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>SEE PAGE 2</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 10/27/15:</u> Mr. Willoughby is just coming in on this matter; parties request a continuance.</p> <p><u>Note:</u> As of 1/7/16, nothing further has been filed.</p> <p>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.</p> <p>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.</p> <p>Therefore, need clarification as to why Fresno County is proper venue pursuant to Probate Code §§ 17002, 17005.</p> <p>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.</p> <p>Reviewed by: skc</p> <p>Reviewed on: 1/7/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19 – Murray</p>	
Cont'd from: 102715				
<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.			
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<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
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<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			

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 Brian G. Nelson (Pro Per)
 Petitioner Aurora Nelson (Pro Per)

Petition for Appointment of Guardian of the Person

		<p>TEMPORARY GRANTED ON COURT'S OWN MOTION EXPIRES 1/12/2016</p> <p>BRIAN G. NELSON and AURORA NELSON, paternal grandfather and step-grandmother, are Petitioners.</p> <p align="center">~Please see Petition for details~</p> <p>Court Investigator's Report was filed on 11/3/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 11/10/2015. <i>Minute Order</i> states the Court grants temporary guardianship; Letters are to issue forthwith.</p> <p>The following issues from the last hearing remain:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i> and 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: <ul style="list-style-type: none"> • Kristal Sidelinker, mother. 2. Need proof of service by mail 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: <ul style="list-style-type: none"> • Andrea Graham, paternal grandmother; • maternal grandparents. 3. <i>UCCJEA</i> form filed on 9/9/2015 does not provide residence information for the last 5 years as required. 																																												
<p>Cont. from 111015</p> <table border="1"> <tr><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>✓ Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td>X</td></tr> <tr><td>Aff.Mail</td><td>X</td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td>X</td></tr> <tr><td>✓ Conf. Screen</td><td></td></tr> <tr><td>✓ Letters</td><td></td></tr> <tr><td>✓ Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>✓ CI Report</td><td></td></tr> <tr><td>✓ Clearances</td><td></td></tr> <tr><td>✓ Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>✓ UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>				Aff.Sub.Wit.		✓ Verified		Inventory		PTC		Not.Cred.		Notice of Hrg	X	Aff.Mail	X	Aff.Pub.		Sp.Ntc.		Pers.Serv.	X	✓ Conf. Screen		✓ Letters		✓ Duties/Supp		Objections		Video Receipt		✓ CI Report		✓ Clearances		✓ Order		Aff. Posting		Status Rpt		✓ UCCJEA		Citation	
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Citation																																															
FTB Notice																																															
		<p>Reviewed by: LEG</p> <p>Reviewed on: 1/8/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 20 – Boore</p>																																													

Petition for Appointment of Guardian of the Person

		TEMPORARY EXPIRES 1/12/16	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued form 11/10/15 as of 1/7/16 the following issues remain:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 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: <ol style="list-style-type: none"> a. L.C. Moore (father) b. Lacey Macu (mother) 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: <ol style="list-style-type: none"> c. Maternal grandparents.
		<p>HERBERT FIELDS, paternal cousin, is petitioner.</p> <p>Please see petition for details.</p> <p>Court Investigator report filed on 1/6/16</p>	
Cont. from 111015			
<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	X	
<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 checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: KT			
Reviewed on: 1/7/16			
Updates:			
Recommendation:			
File 21 – Moore			

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

Petition for Appointment of Guardian of the Person

		<p>TEMPORARY EXPIRES 11/10/2015; extended to 1/12/2016 as to BONNI CABRERA ONLY</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p>
		<p>BONNI CABRERA, half-sister, and RICARDO CABRERA, 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"> Anita Martin Brown, mother; (service by mail is insufficient);
<p>Cont. from 111015</p>			
	Aff.Sub.Wit.	<p>~Please see Petition for details~</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	<p>Court Investigator's Report was filed on 11/3/2015.</p>	<p>Reviewed by: LEG</p>
	PTC		
	Not.Cred.	<p>✓ Pers.Serv.</p>	<p>Reviewed on: 1/7/16</p>
✓	Notice of Hrg		
✓	Aff.Mail	<p>✓ Conf. Screen</p>	<p>Updates:</p>
	Aff.Pub.		
	Sp.Ntc.	<p>✓ Letters</p>	<p>Recommendation:</p>
✓	Pers.Serv.		
✓	Duties/Supp	<p>✓ Order</p>	<p>File 22 – Martin & Brown</p>
	Objections		
	Video Receipt	<p>✓ Aff. Posting</p>	
✓	CI Report		
✓	Clearances	<p>✓ Status Rpt</p>	
✓	Order		
	Aff. Posting	<p>✓ UCCJEA</p>	
	Status Rpt		
✓	UCCJEA	<p>Citation</p>	
	Citation		
	FTB Notice	<p>FTB Notice</p>	
	FTB Notice		

Petitioner Drhew Yang Ngialah (Pro Per)

Petition for Letters of Administration

DOD: 5/18/2015	DRHEW YANG NGIALAH , niece, is Petitioner and requests appointment as Administrator (<i>Bond is not addressed.</i>)	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 11/10/2015. Minute Order states examiner notes provided in open court.</p> <p>The following issues from the last hearing remain:</p> <ol style="list-style-type: none"> 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 \$2,000.00. 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. Petition is significantly defective in several aspects and has not been reviewed based upon the issue raised in Item 1, above.
Cont. from 111015	Full IAEA — ?	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Decedent died intestate.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Residence — Fresno Publication — Need	
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.	Estimated value of the Estate: Personal property - \$2,000.00	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Total — - \$2,000.00	
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp	Probate Referee: Rick Smith	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LEG
		Reviewed on: 1/7/16
		Updates:
		Recommendation:
		File 23 - Yang

Petition of Trustee to Appoint Successor Trustee

DOD: 3/9/15		<p>KENNETH THAYER, Trustee of the Jacqueline Bolton Trust and Olive Williams Unitrust created under the Olive Williams Family Trust dated 10/19/87 (the Trust), is Petitioner.</p> <p>Petitioner states Olive Williams was trustor and initial trustee of the Trust, which became irrevocable at her death on 8/9/91. Upon her death, Jacqueline Bolton and Kenneth became Substitute Co-Trustees. Petitioner Kenneth Thayer intends to resign as trustee. Jacqueline Bolton died 3/9/15.</p> <p>Once month prior to her death, Ms. Bolton executed a petition to effectuate Mr. Thayer's resignation as Substitute Co-Trustee and appointment of Bruce Bickel as successor trustee; however, Ms. Bolton died before that petition was filed.</p> <p>Petitioner resides in Bakersfield, CA. Prior to Ms. Bolton's death, the principal place of administration of the trust was Los Angeles, CA.</p> <p>Section Four of the Trust provides that Mr. Thayer may petition a court of competent jurisdiction to appoint a substitute co-trustee.</p> <p>Petitioner requests that the Court accept his resignation as trustee and requests that the Court appoint Bruce Bickel as sole trustee as set forth under Section Four of the Trust terms and request the Court appoint said trustee without bond, as stated in Section Four.</p> <p>Petitioner believes appointment of Mr. Bickel is in the best interest of the Trust and those persons interested because he is familiar with Jacqueline Bolton's general trust matters, including those relating to the Olive Williams Trust and the subtrusts created thereunder. Mr. Bickel is a professional fiduciary and serves as successor trustee to Jacqueline Bolton's various other trusts, and is also the trustee for both of Ms. Bolton's late husband's trusts. His expertise and familiarity with these other matters will invaluablely aide in the administration of the trust.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Petitioner's signature and verification are not dated. Need consent to serve by Bruce Bickel. It does not appear that Mr. Bickel was served with Notice of Hearing. The Court may require continuance for 30 days' notice or waiver of notice from Mr. Bickel. 	
Cont. from 111215				
<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			
<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 24 - Bolton				

Page 2

Petitioner provides nominations of Mr. Bickel and waivers of notice from all interested persons including:

Braille Institute of America, Christian Recording Services for the Blind, American Humane Society, Women's Christian Temperance Union, Bob Jones University, University of California, Los Angeles Medical Center.

Petitioner requests that:

1. The Court appoint Bruce Bickel as sole Trustee of the Jacqueline Bolton Trust and the Olive Williams Unitrust created under the Olive Williams Family Trust dated 10/19/87, to serve without bond. Kenneth Thayer shall deliver the trust assets to Bruce Bickel within 30 days after issuance of the Order;
2. The Court accept the resignation of Kenneth Thayer as Substitute Co-Trustee of the Jacqueline Bolton Trust and the Olive Williams Unitrust created under the Olive Williams Trust dated 10/19/87; and
3. The Court make all further and proper orders.

Petition for Appointment of Guardian of the Person

		THERE IS NO TEMPORARY. No temporary was requested.	NEEDS/PROBLEMS/COMMENTS:	
		BLANCA PORTILLO , maternal grandmother, is petitioner.		
Cont. from		Please see petition for details.	<ol style="list-style-type: none"> 1. Need Notice of Hearing. 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: <ol style="list-style-type: none"> a. Frank Gonzalez, Jr. (father) 3. 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: <ol style="list-style-type: none"> a. Frank Gonzalez (paternal grandfather) b. Elaida Alaniz (paternal grandmother) c. Jaime Mejia (maternal grandfather) 	
<input type="checkbox"/>	Aff.Sub.Wit.	Court Investigator Report filed on 1/6/15		
<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			X
<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 checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 1/8/15	
			Updates:	
			Recommendation:	
			File 25- Gonzales	

Petition for Appointment of Guardian of the Person

Age: 1	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Notice of Hearing</i> . 2. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: a. Father – <i>personal service required</i> b. Lucero Perez (mother) – <i>personal service required</i> c. Paternal grandparents – <i>Notice by mail ok</i> d. Manuel Perez (maternal grandfather) – <i>Notice by mail ok</i>
	LUCILA GARCIA , maternal grandmother, is Petitioner.	
	Father: UNKNOWN	
Cont. from	Mother: LUCERO PEREZ	
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandparents: UNKNOWN	
<input checked="" type="checkbox"/> Verified	Maternal grandfather: MANUEL PEREZ	
<input type="checkbox"/> Inventory	Petitioner states [see file].	
<input type="checkbox"/> PTC	Court Investigator Julie Negrete filed a report on 01/06/16.	
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input 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 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: 01/08/16
		Updates:
		Recommendation:
		File 26- Perez

Petitioner DeCorona, Rosaura Torres (pro per – maternal grandmother)

Petition for Appointment of Guardian of the Person

Cecilia, 9	<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS: 1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Paternal grandparents b. Eustaquio Corona
Brian, 6	ROSAURA TORRES DECORONA, maternal grandmother, is Petitioner.		
	Father: JOE CISNEROS – <i>Consents and Waives Notice</i>		
Cont. from	Mother: CLAUDIA CORONA TORRES – <i>Consents and Waives Notice</i>		
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandparents: UNKNOWN		
<input checked="" type="checkbox"/> Verified	Maternal grandfather: EUSTAQUIO CORONA		
<input type="checkbox"/> Inventory	Petitioner states [see file for details].		
<input type="checkbox"/> PTC	Court Investigator Charlotte Bien filed a report on 12/17/15.		
<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 type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: JF
			Reviewed on: 01/08/16
			Updates:
			Recommendation:
			File 27- Corona

Petition for an Order to Confirm Successor Trustee and Trust Assets

		HANNAH M. JOHNSON , successor Trustee, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required.</p>
		Petitioner states she named as successor Trustee in the trust instrument.	
Cont. from		On 12/7/05 Robert L. Johnson, settlor, acquired real property located at 1376 W. Celeste, Fresno, CA.	
<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	The Real Property remained in titled in the name of Robert L. Johnson, a married man as his sole and separate property, until his death on 5/6/15.	
<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 type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		On 1/19/11, Robert L. Johnson created the Robert Johnson Revocable Trust. The Real Property at issue was listed on schedule "A" of the Trust.	
		After Robert L. Johnson created the trust he did not transfer the Real Property by deed to the Trust.	
		As proof of his intent to transfer the Real Property into the Trust, Robert Johnson signed a Trust Transfer Deed dated 7/6/12, that was notarized on that same date.	
		When the Transfer Deed was submitted to the County Recorder's Office, it was rejected because Settlor signed the Transfer Deed as "Robert L. Johnson" and not as "Robert Johnson."	
		Settlor's health thereafter deteriorated significantly and he did not sign or record a new deed conveying the Real Property to the Trust. Thus, at the time of the Settlor's death, the Real Property remained titled in his individual name as his separate property.	
		Please see additional page	
Reviewed by: KT			
Reviewed on: 1/8/16			
Updates:			
Recommendation:			
File 28- Johnson			

28 The Robert Johnson Revocable Trust 1-19-2011 Case No. 15CEPR01111

Petitioner now petitions this Court to confirm Settlor's Real Property as a Trust asset to be held and administered pursuant to the terms of the Trust.

Wherefore, Petitioner prays for:

1. An order determining that the Robert Johnson Revocable Trust, dated January 19, 2011, is valid;
2. An order confirming that Hannah M. Johnson is the successor trustee of the Robert Johnson Revocable Trust;
3. An order confirming that all of Robert Johnson's right, title and interest in real property commonly known as 1376 W. Celeste Ave. is an asset of the Robert Johnson Revocable Trust, to be held, administered, and distributed by Hannah M. Johnson, as successor trustee, under the terms of the Trust.

Attorney Jeffrey A. Jaech (for Petitioners Betty Ann Bianchi and Robert W. Bianchi, Co-Trustees)
 Sixth Account and Report of Co-Trustees upon Conservatee's Death,
 and Petition for Its Settlement, Excusing Further Court Accountings, for
 Discharge of Bond, and for Allowance of Attorneys' Fees

DOD: 9/19/2015		<p>BETTY ANN BIANCHI and ROBERT W. BIANCHI Co-Trustees, are Petitioners.</p> <p>Account period: 1/1/2015 – 9/30/2015</p> <p>Accounting - \$2,623,417.33 Beginning POH - \$2,623,417.27 Ending POH - \$2,623,243.33 (\$5,387.40 cash)</p> <p>Co-Trustees - waive Attorney - \$6,564.00</p> <p>(\$5,169.00 per itemization and declaration, for services and costs advanced to the Vera Silberstein Conservators' Trust from 3/11/15 to 9/19/15; for 7.2 attorney hours @ \$395.00/hr and 12.60 paralegal hours @150/hr; and \$1,395.00 for legal services and costs advanced through 9/19/2015 for the Vera Silberstein Primary Trust for Personal Care, pursuant to a Summary Judgment Order approved at time of trial by Judge Petrucelli;)</p> <p>Current bond - \$85,000.00 (Petitioner requests the further requirement of bond be waived; Waiver of Accounting by Co-Trustees and Waiver of Bond Requirement filed 11/2/2015 by beneficiaries;)</p> <p>Petitioners state they expect that all beneficiaries will waive any requirement of future Court accountings [Waivers were filed 11/2/2015.] the Conservators' Trust estate has very little cash to pay its obligations because of the costs of improvements made to the Tahoe property (please refer to Third Account); the deceased Conservatee's family has loaned additional funds to the Trust estate during past accounting periods; Petitioners' family members have recently built a new cabin on the Tahoe property at their own expense.</p> <p>Petitioners pray for an Order that:</p> <ol style="list-style-type: none"> 1. The Sixth account of the Co-Trustees be approved, allowed and settled as filed; 2. Petitioners be authorized and directed to pay the attorney \$5,169.00 for services and costs advanced, plus \$1,395.00 for fees and costs relating to the Vera Silverstein Trust for Personal Care (totaling \$6,564.00), [all paid from the Vera Silberstein Conservators' Trust]; 3. Petitioners need not file any further Court accountings; and 4. The bond be discharged as no longer required. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 1/5/2016. Minute Order states counsel reports that he received an objection regarding this matter; requests a short continuance.</p> <p>Note: Withdrawal of Objection and Stipulation was filed 1/7/2016. Proposed order has been interlineated to replace the statement regarding the filing of an objection on 12/30/2015, which did not occur, with a statement that a withdrawal and stipulation was filed 1/7/2016.</p>	
Cont. from 010516				
	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			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 1/8/16</p> <p>Updates:</p> <p>Recommendation: File 32 - Silberstein</p>		